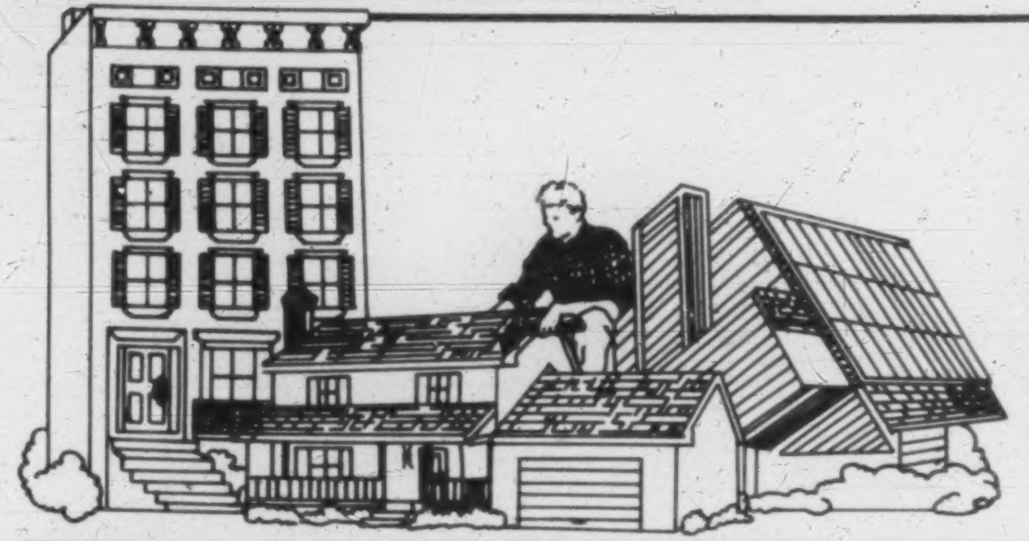


HOMEOWNER DEMOGRAPHICS

DIY activity: A special NHCN/NAHB report

Survey finds age of home a key in DIY purchases

NATIONAL REPORT— The age of a house has a measurable influence on the DIY products homeowners purchase and the projects they tackle, according to a new study by *National Home Center News.*

The study explores the DIY preferences of American homeowners according to whether they live in a single-family house built before 1940, of which there are 13.7 million; built during the 1940's, 4.9 million; the 1950's, 10 million; the 1960's, 11.2 million, or since 1970, 12.6 million.

Home improvement product preference and projects likely to be undertaken are sometimes dramatically affected by a house's age, the report reveals.

While almost 10% of homeowners in pre-1940 homes have bought ceiling tile, for example, fewer than 2% in homes built since 1970 have done so. Conversely, ceiling fans have been purchased by almost 20% of homeowners in houses built since 1970, while fewer than 3% of those in pre-1940 homes have bought them.

Significantly, with two-thirds of America's housing stock built during the past 30 years, the study also shows that the newer the house, the more likely its owner will shop at a home center.

For a complete list of the most popular DIY products, see p. 47

Of those living in homes built since 1970, 77% chose home centers over general merchandise, discount or specialty stores. And indeed, almost as many homes have been built since 1970 as exist from the entire pre-1940 period.

These findings are drawn from the 1982 Survey of Additions and Alterations in Existing Single Family Homes, conducted by *National Home Center News* in conjunction with the National Assn. of Home Builders.

It explores how the age of the American home influences the projects DIYers tackle, the products they buy, where and why DIY products are purchased and what projects DIYers plan to undertake in the next year or two. Questionnaires were mailed to 8,000 households in late March; 904 valid responses were received.

Conclusions are applicable to the owners of the nation's 4.4 million single-family, detached, owner-occupied dwellings.

The study found that:

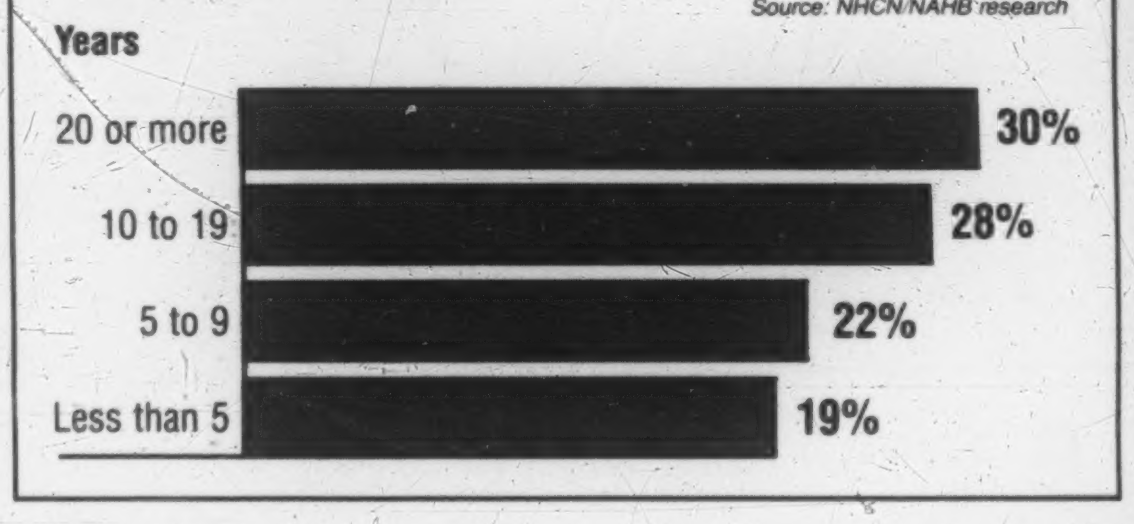
- The most likely DIY alternation homeowners will undertake during the next 12 months is changing a roof;
- Over the next 24 months finishing a basement or recreation room will be given highest priority;
- Kitchen remodeling was the

(Continued on page 16)

HOMEOWNER PROFILE

How long they've lived in their current home:

Source: NHCN/NAHB research



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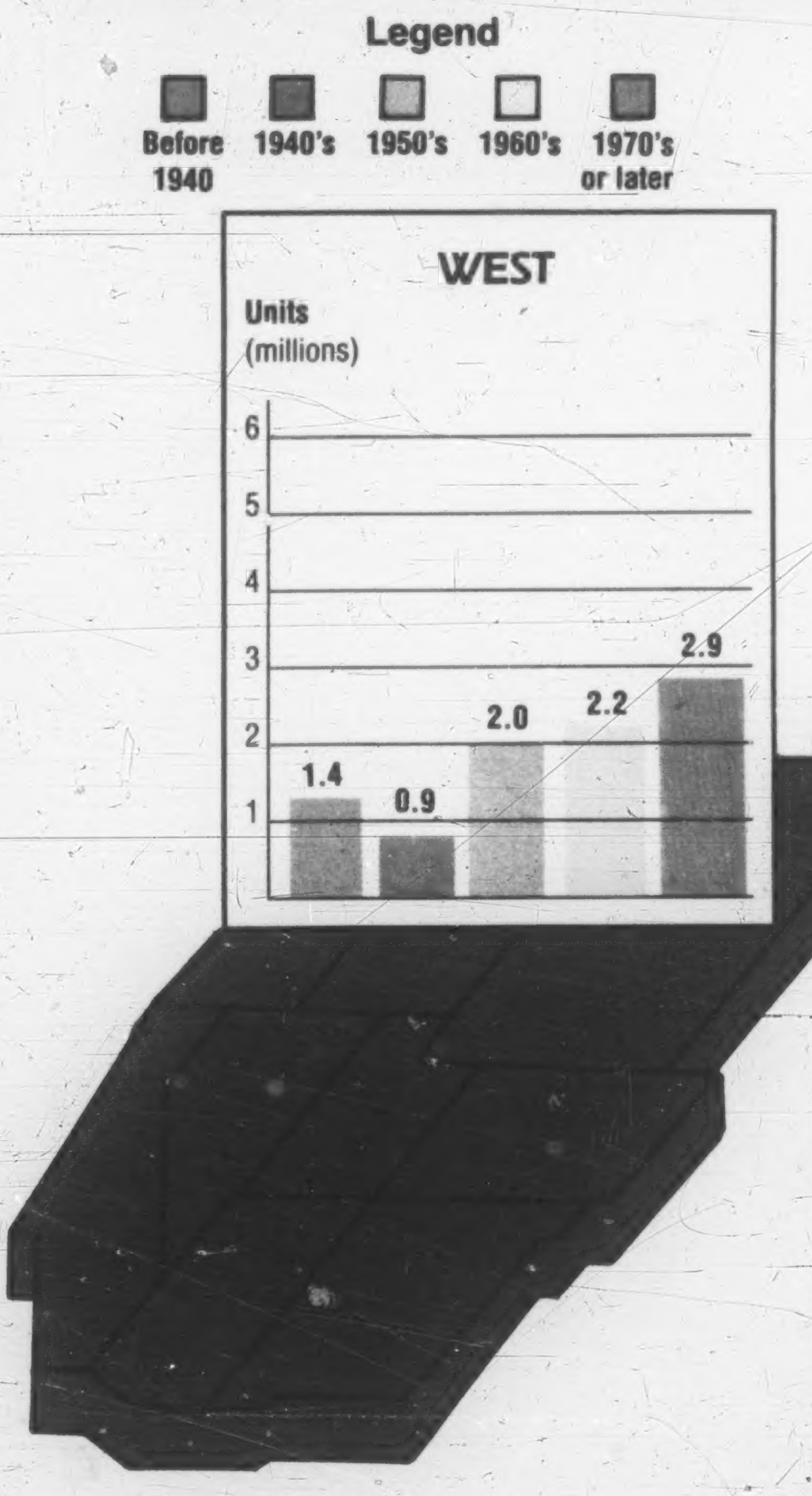
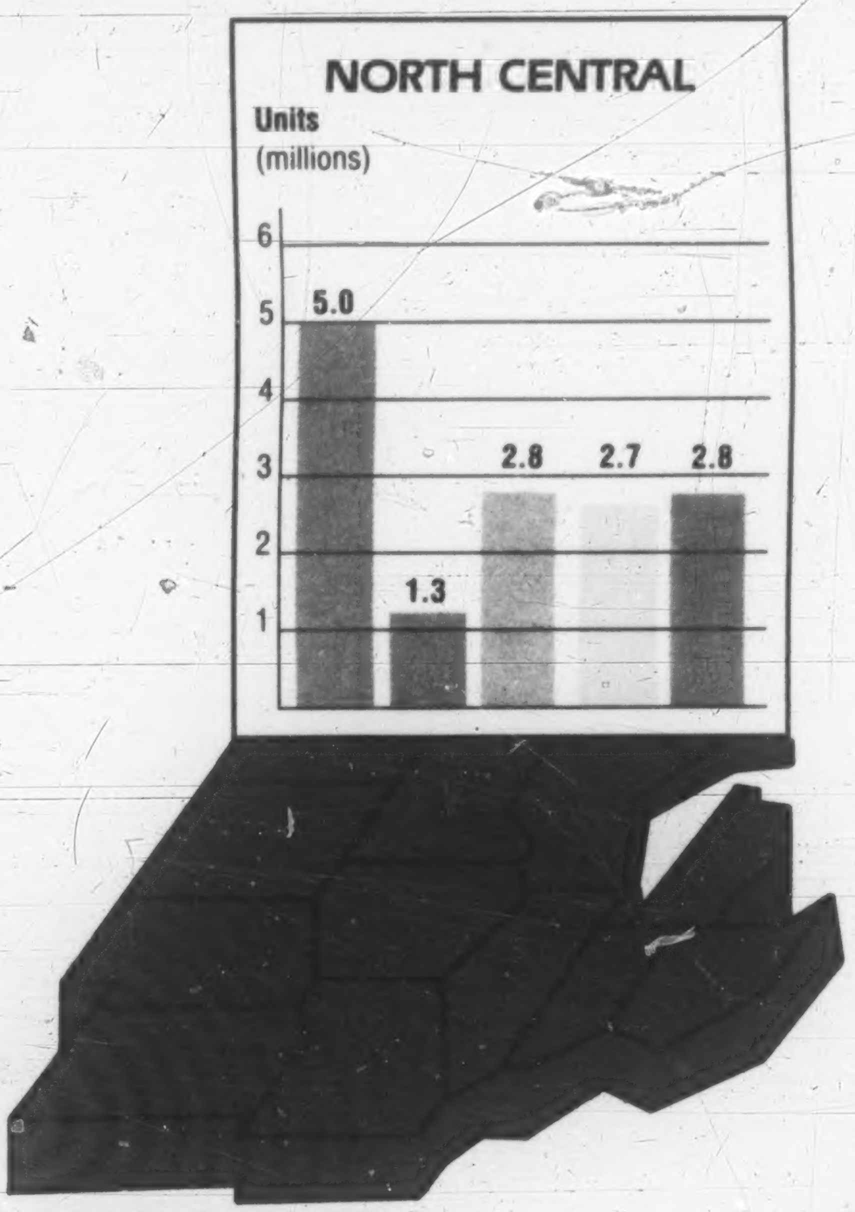
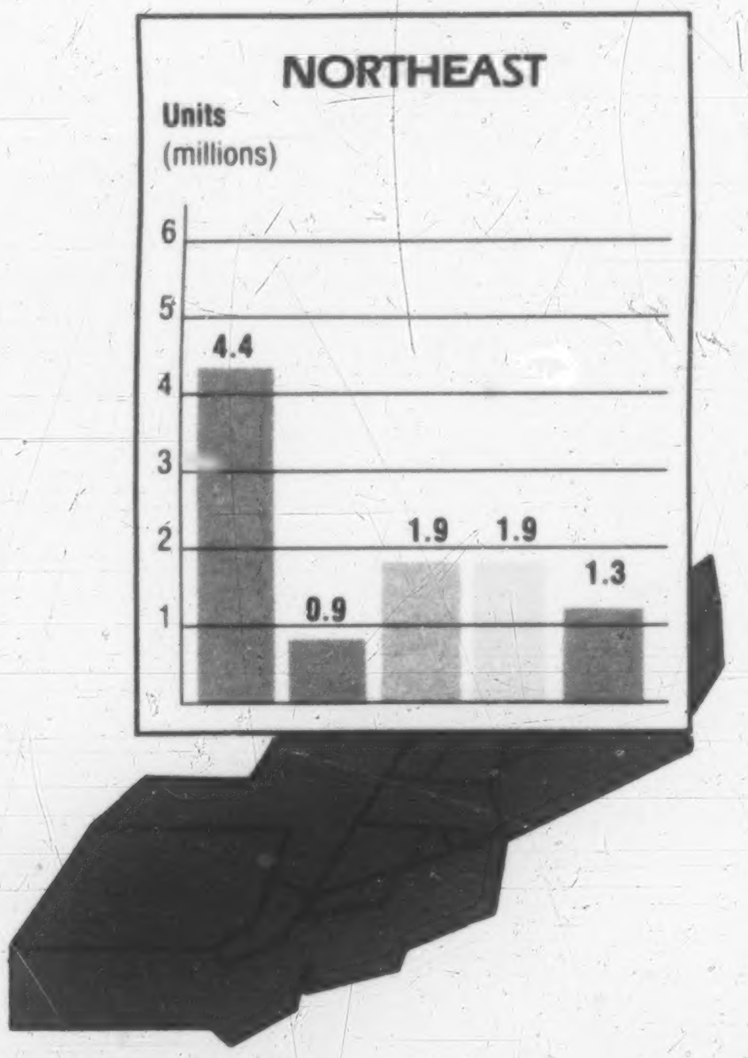
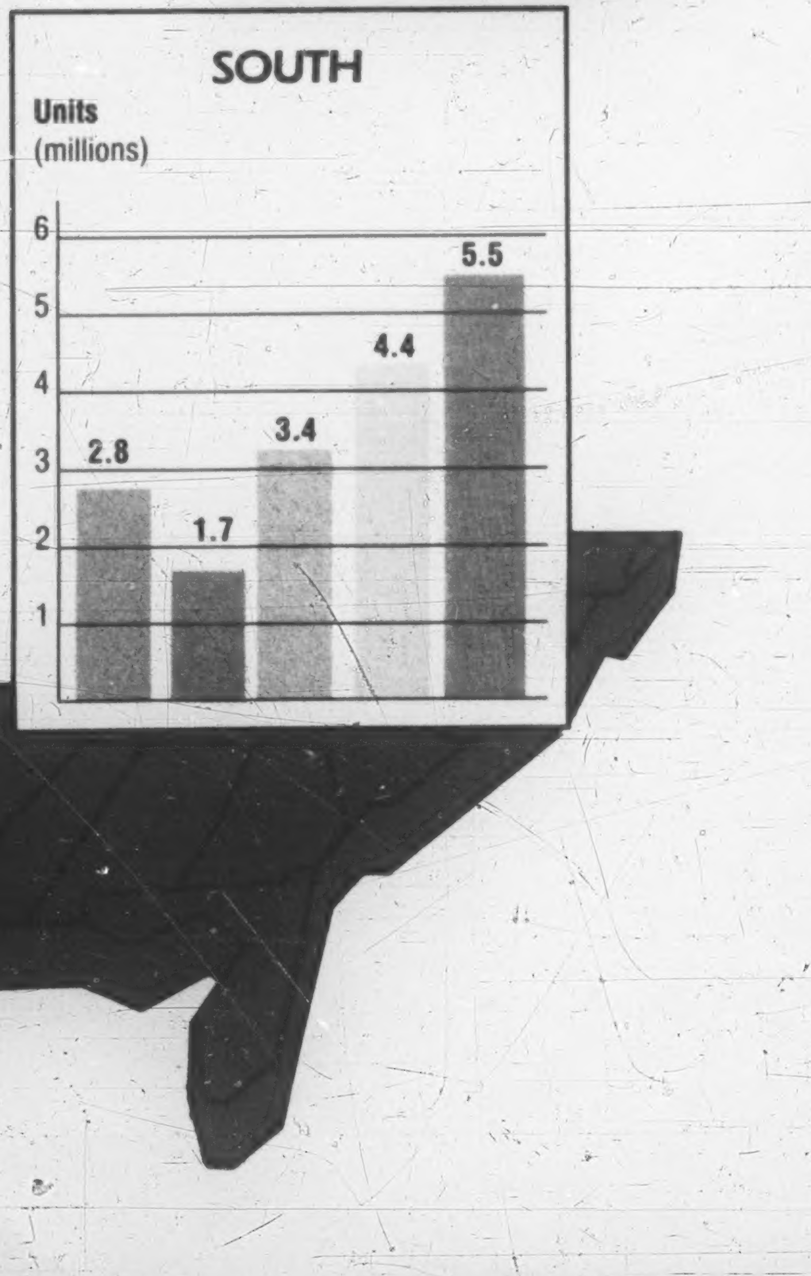






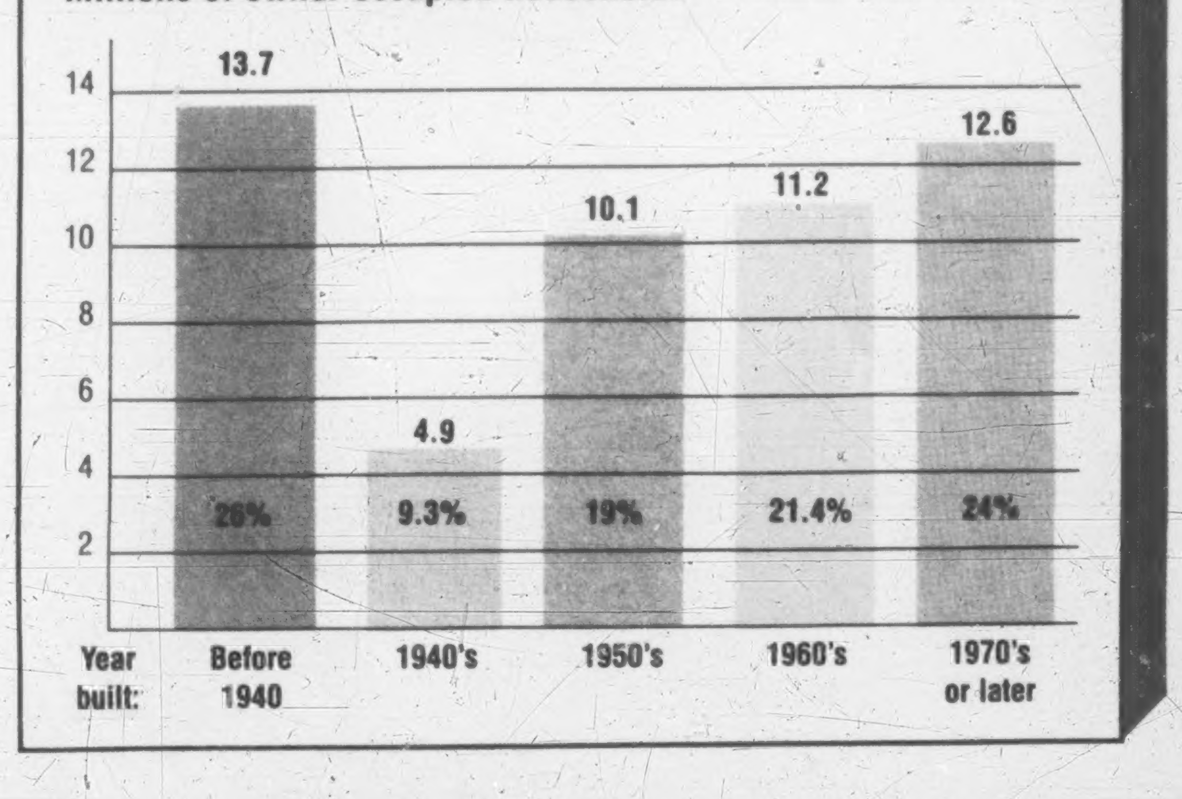


THE NATION'S HOUSING STOCK

Age of America's homes

Millions of owner-occupied households

Source: NHCN/NAHB research



DIY demographics: A special report

'Typical' DIY customer is 35-55, earns over $25,000

NATIONAL REPORT— The homeowner that home center retailers can target as their "typical" customer is a 34-55-year-old professional who has lived in his residence for over 10 years, has a wife and children and a household income exceeding $25,000.

This composite was drawn from a survey of 8,000 owners of single-family, detached, owner-occupied dwellings, which number 44.4 million across the United States. The study was conducted jointly by *NHCN* and the National Assn. of Home Builders, Washington.

The survey discovered that among its 900 respondents, a full 38%, or 16.9 million homes, are occupied by first-time home buyers, compared with 30% for second-time home owners, with 58% of the respondents having resided in their homes in excess of 10 years (30% for 20 or more years). These statistics appear to show less mobility among these homeowner types than is often supposed.

Among first-time buyers, there also tends to be a much higher degree of DIY willingness than among those purchasing their second or third residence. However, this trend reverses itself among fifth-time buyers, who as veteran homeowners show a surprisingly strong DIY propensity.

The majority of respondents (56%) said their head of household was between the ages of 34-64, with 34%, or 15.1 million homes, in the 34-54 range. Persons 65 or older constituted 30% of the total head of household group.

Professionals made up 41% of all heads of household, followed by retirees, representing 31% of the total. Breaking this demography out by age of home, the survey showed that families whose household head was 65 years or older tended to live in homes that were constructed in the 1940's or before.

Interestingly, while professionals were flocking to homes built after 1960, they also made up the highest percentage (31%) of those respondents living in pre-1940 dwellings; an indication this occupational group was, in part, seeking out older homes for renovation, as well as having a greater willingness to settle closer to urban areas where most pre-1940 homes are

Families with children still make up the largest chunk of households, with 43% of the respondents, or 19.1 million homes, falling into the classification. But another 39% were families with no children, and a startling 8% of all households, or 3.6 million homes, were owned by single women, double the number headed by single men or women with children.

Home preference among these family groups revealed that single women tended to occupy older homes, representing 14% of those respondents living in homes built before 1950, reflecting a combination of widows, and younger independent professionals. The childless husband and wife group formed the greatest percentage of those families in homes constructed in the 1950's and before (44% of those in 1950-59 dwellings). Not surprisingly, the husband and wife with children made up 37% of all the pre-1960 households; they also made up the largest cluster (59%) of those living in homes built after 1970.

The affluence of the prospective homeowner also appears to be growing. Of those surveyed, 40%, or 17.8 million households, said their combined family incomes were $25,000-$50,000, with another 14% in the $20,000-$25,000 spectrum.

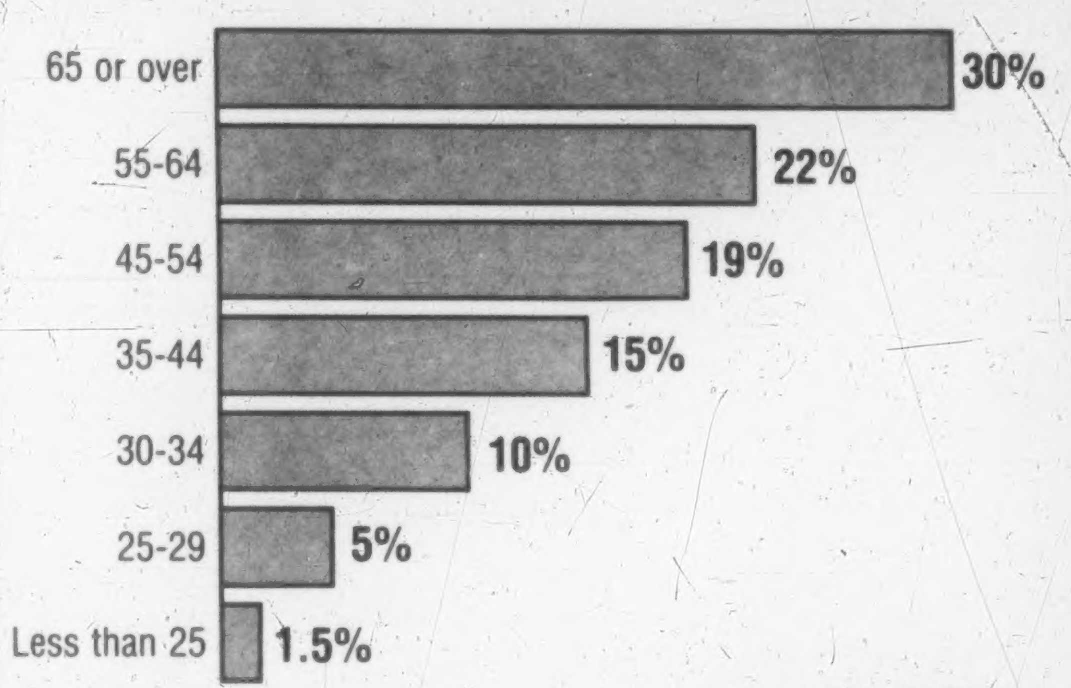
These homeowners will also be a lot smarter, too. Some 65% of the respondents replied they had had some college in their educational background, with a remarkable 39%, or 17.4 million households, having either a baccalaureate or advanced degree.

Of those who have completed college, the age of home prefer-

(Continued on page 16)

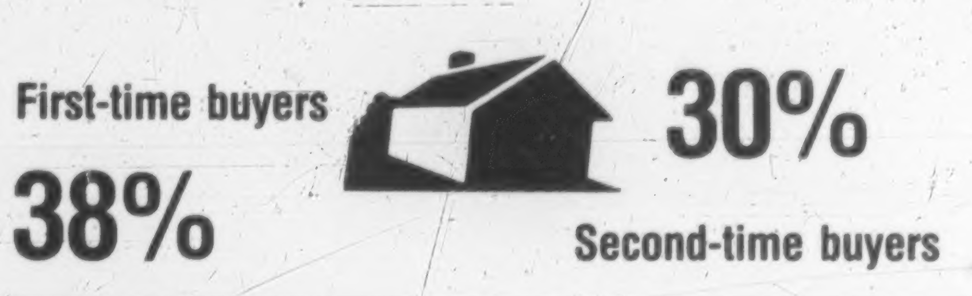
HOMEOWNER PROFILE

Age of the head of household



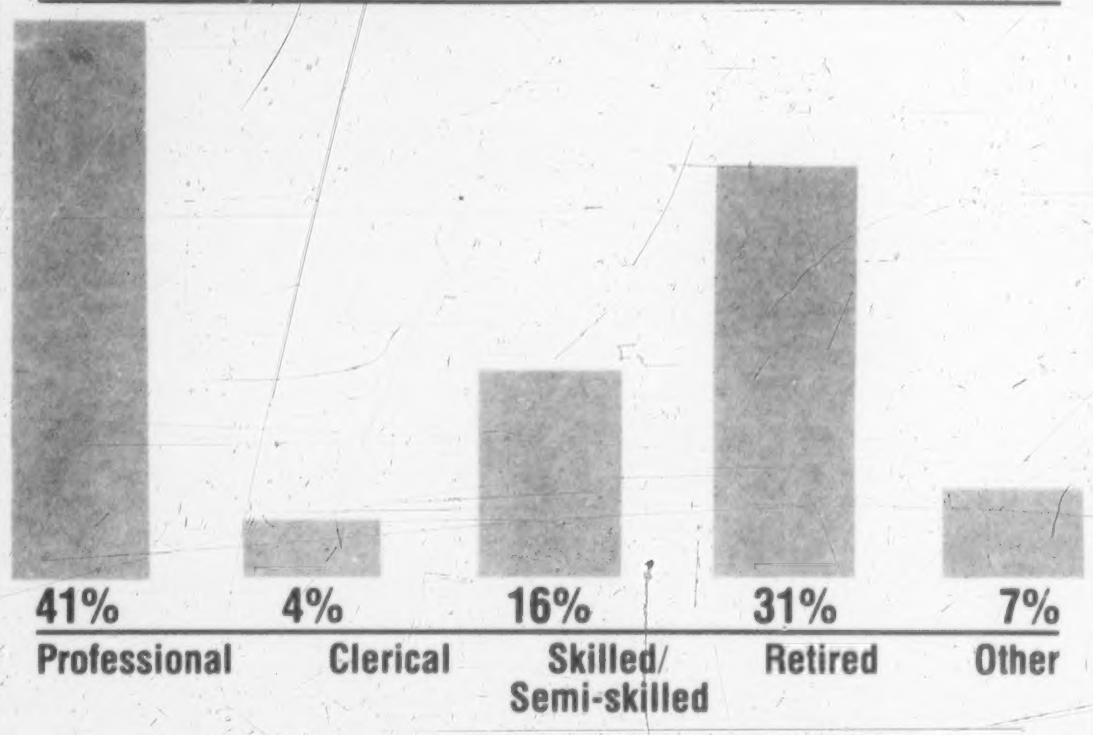
Source: NHCN NAHB research

HOMEOWNER PROFILE



HOMEOWNER PROFILE

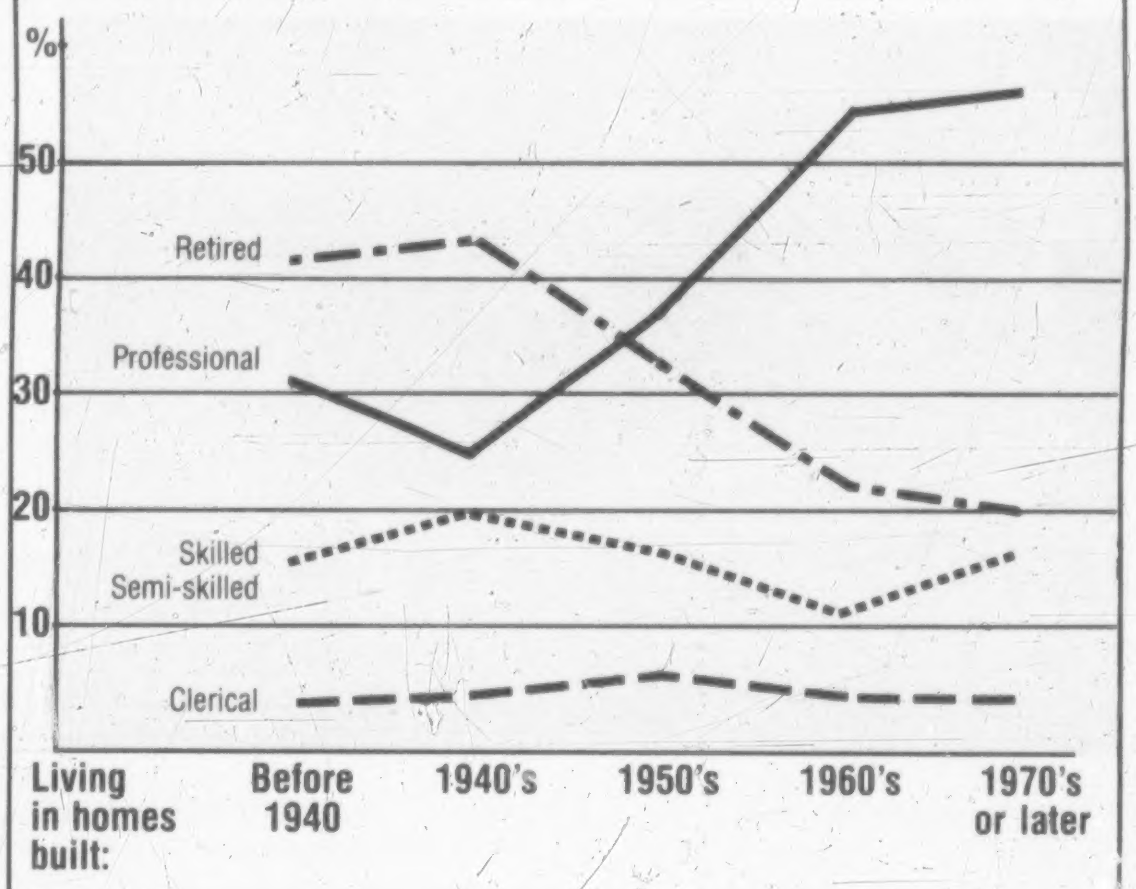
Occupation of head of household



Of the nation's 44.4 million single-family, detached, owner-occupied dwellings, 41% or 18.2 million are owned by professionals. As might be expected most of this group lives in newer units. But there is also a trend among professionals to live in America's oldest homes.

HOMEOWNER PROFILE

Occupational breakdown by age of home



HOMEOWNER PROFILE

Head of household

Pre-1940 homes

Median age
60.2 years
(18%-30 to 44)
Median income
$20,486
Median sale price
$52,596

1940's homes

Median age
61.5 years
(18%-30 to 44)
Median income
$20,800
Median sale price
$52,737

1950's homes

Median Age
57.3 years
(22.1%-30 to 44)
Median income
$24,768
Median sale price
$52,737

1960's homes

Median age
53.2 years
(22%-30 to 44)
Median income
$31,832
Median sale price
$65,298

1970's homes

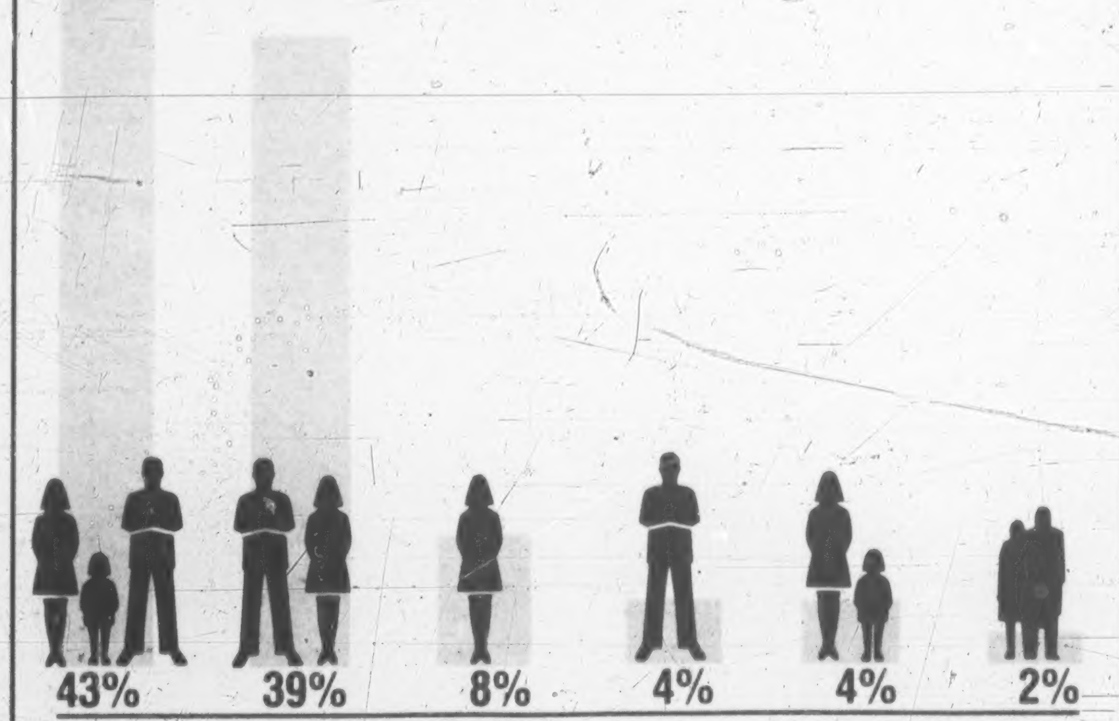
Median age
45.8 years
Median income
$32,074
Median sale price
$78,195

All respondents

Median age
55.6 years
(24%-30 to 44)
Median income
$27,980
Median sale price
$62,118

HOMEOWNER PROFILE

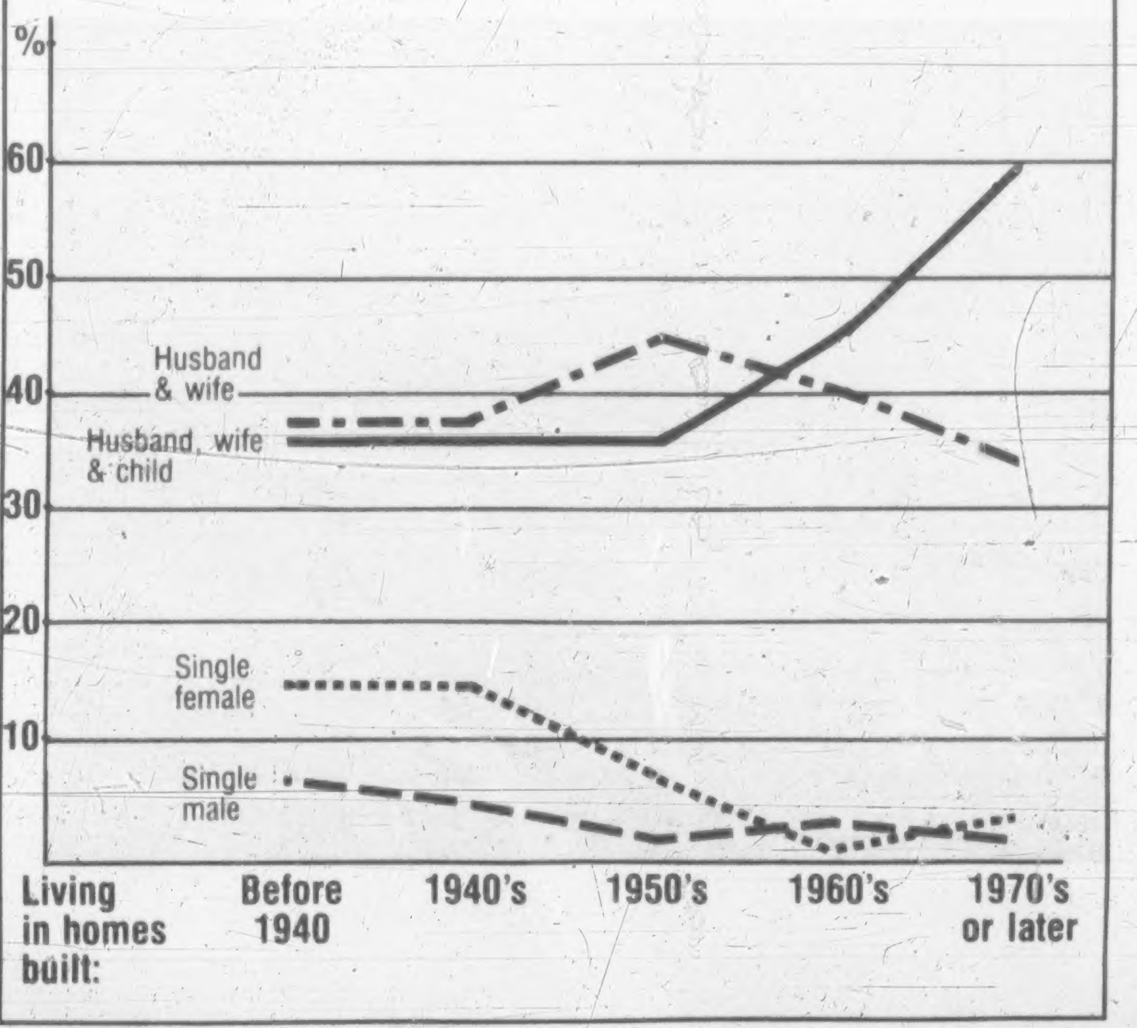
Type of household



The greatest portion of the nation's single-family, detached, owner-occupied homes, particularly the newer ones, are occupied by a basic family unit. However, 3.5 million homes, especially older ones, are owned by single women.

HOMEOWNER PROFILE

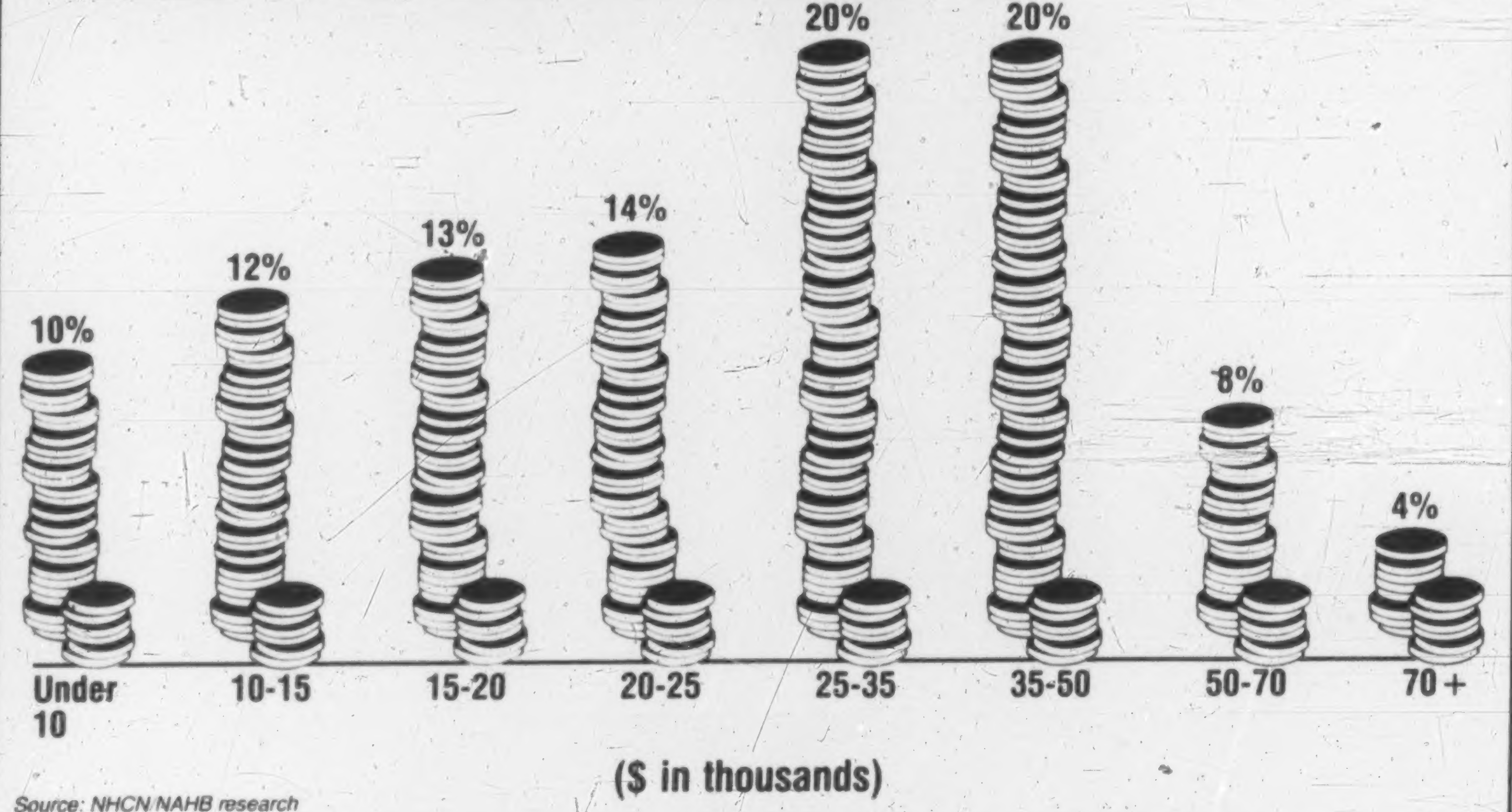
Type of household by age of home



DIY demographics: A special report

HOMEOWNER PROFILE

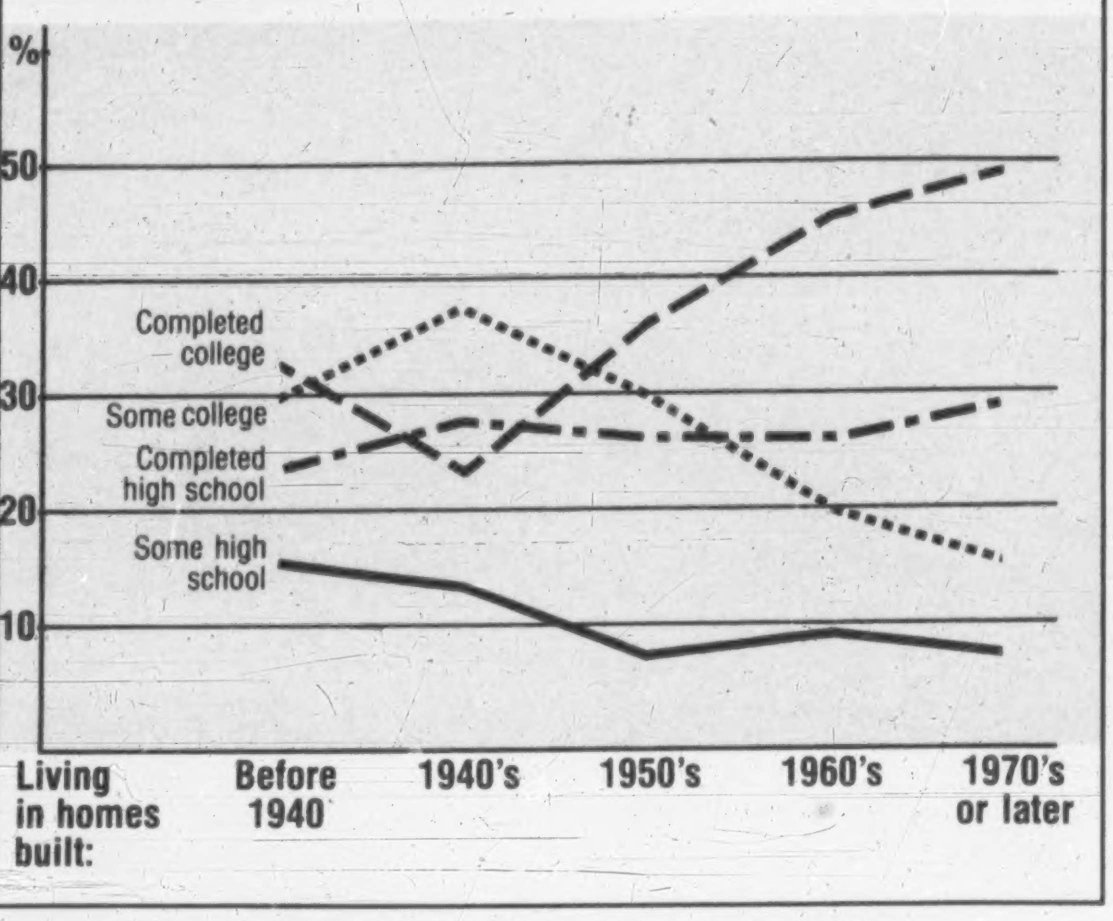
Combined family income



Source: NHCN/NAHB research

HOMEOWNER PROFILE

Educational breakout by age of home



Typical DIY

(Continued from page 15)

ence parallels closely that of professionals: they are 32% of all homeowners of pre-1940's dwellings, and 59% of the post-1970's group. However, it is important to note that those respondents with a high-school education make up the second largest per cent of pre-1940 homeowners (30%), and are the largest sector living in homes constructed during 1940-49 (37%). There is a fair amount of consistency among those households with some college: they represent 23% of those in pre-1940 homes; 27% of homes built in 1940-49; 26% of the 1950-69 period, and 29% of the post-1970 generation.

Age of home a key

(Continued from page 13)

most often completed alteration this year. Consumers spent $11.9 billion just on the top 10 most popular DIY projects.

Selection was the main reason 69% of those surveyed chose to spend their DIY dollars in home centers compared with 59% that chose general merchandise outlets for price and the 54% that pointed to discount operations for the same reason.

Advertising affected the buying decisions of three-out-of-four homeowners, with newspapers overwhelmingly the most influential medium. Direct mail was second and significantly lower in level of impact.

The survey questioned respondents about 132 different home improvement items divided into the following categories: appliances, heating/cooling, electrical, plumbing, energy conservation, security hardware, decoratives, kitchen, fireplace/stove, lawn/garden/outdoor power, tools and exterior.

Respondents were asked whether they bought or planned to buy a product and whether the installation was or will be DIY.

The results were cross tabulated according to the year the respondent's house was built, his geographic region, combined household income, the age of the head of household and the number of times he had been a homeowner.

Respondents were also asked about 20 varied home improvement projects: whether a job was completed in the past 12 months; by the homeowner or a contractor; the cost, and whether the job might be undertaken during the next year or two.

The top three products most likely to be purchased by homeowners during the next 12 months are seed and fertilizer, paint and fasteners, the same trio that led the lists of items bought this year.

They are followed, in order, by carpet, paint tools, drapes, gutters and downspouts, wallpaper, attic insulation and garden hose.

Evaluations of the products according to the five demographic factors used in the survey are included in this *NHCN* special section.

Antique mirror squares
were applied
to the wall
and large
folding window screens
in this room.

MIRROR TILES...
New way to offer your customers professional decorating on a do-it-yourself budget!

Traditionally, a mirrored wall always conveys the impression of "professional" decorating. Now, with the recent introduction of mirror tiles, your do-it-yourself customers can achieve this same professional look on a handyman's budget.

As the room scene (pictured) illustrates, decorating with mirror tiles offers an almost unlimited variety of treatments as well as professional looking results. In this application, antique mirror tiles were applied floor-to-ceiling between the two windows. Then, as a further accent, folding window screens were also faced with gold vein antique mirrors.

If you aren't currently offering your customers this new decorating convenience, isn't it time to consider mirror tiles? If you are interested in manufacturing sources, various types of mirrors, and some innovative ideas, the National Association of Mirror Manufacturers can help. You will find it all in our free book—"Mirror Magic" (24 pages, full color, 86 photos). For a copy write Mirror Magic, Dept. MN:

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PEOPLE

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National Home Center News

ADDITIONS & ALTERATIONS

Top 10 DIY projects completed in last 12 months

Project	Number of households who did themselves* (in thousands)	$ spent
1. Remodeled kitchen	2,264	$1,550
2. Finished basement/ rec room	1,954	1,460
3. Changed water heater	1,909	212
4. Changed roof	1,421	710
5. Changed heating system	1,066	673
6. Enclosed existing deck/patio/porch	799	567
7. Added patio	755	1,647
8. Finished/added den	755	1,363
9. Added deck	710	538
10. Added full bath	577	660

*represents detached, single-family homes

Source: NHCN/NAHB research

ADDITIONS & ALTERATIONS

DIY project plans—Next 12 months

Project	Number of households who plan to do themselves* (in thousands)
1. Change roof	1,066
2. Cover/enclose existing deck/patio/porch	799
3. Add deck	710
4. Add patio	577
5. Remodel kitchen	488
6. Change water heater	444
7. Change/add air-conditioner	444
8. Finish basement/ rec room	399
9. Add porch/solar room	266
10. Change heating system	222

*represents detached, single-family homes

ADDITIONS & ALTERATIONS

DIY project plans—12-24 months

Project	Number of households who plan to do themselves* (in thousands)
1. Finish basement/ rec room	1,021
2. Remodel kitchen	977
3. Change roof	755
4. Add deck	533
5. Change heating system	488
6. Change/add air-conditioner	444
7. Add fireplace	444
8. Change siding	311
9. Cover/enclose existing deck/patio/porch	311
10. Add full bath	266

*represents detached, single-family homes

Roofing jobs have the greatest DIY potential

During the next 12 months changing a roof will be the most typical addition or alteration tackled by homeowners. Last year kitchen remodeling was most popular.

Covering or enclosing an existing deck, patio or porch or adding a deck or patio are also among the most likely alterations and additions this year.

These conclusions were derived from the *NHCN*/NAHB survey in which respondents were questioned about 20 different home alterations and additions: which projects were completed this year; whether the work was DIY; cost, and the projects planned for the next 12 and 24 months.

Of the 900 respondents, 2.4% plan to change a roof during the next 12 months. Since the survey is representative of 44.4 million single-family, detached, owner-occupied households, this figure is equal to 1.07 million consumers in potential market terms. Those who changed roofs last year reported spending an average of $710 per job.

The total consumer spending on the top 10 DIY additions and alterations completed last year was $11.94 billion.

During the next 12 months 1.8% of the respondents, or 800,000 homeowners, plan to cover or enclose an existing deck, patio or porch.

During the same period 710,000 homeowners will add a deck and 500,000 will remodel kitchens.

Over a longer period the same projects remain popular, although the priority with which they are treated changes.

USG
ADAMANT
asphalt roofing

Selection makes home centers most homeowners' first choice

NATIONAL REPORT—Selection of merchandise is the primary reason single-family homeowners shop home centers over discount, general merchandise or specialty outlets for home improvement products, according to the *NHCN*/NAHB market study.

When asked "where do you shop for home improvement/alteration goods," an overwhelming 70% of the 900 respondents to an *NHCN*/NAHB market survey said they went to a home center. The closest rival was general merchandise stores, with a 59% response.

The reasons for this gap were clearly defined: 64% of those going to home centers primarily said they did so for that store's product selection, with price (47%) and convenience (45%) following suit. Eighty-nine per cent of those who shopped discount stores primarily, and 56% of those going to general merchandise outlets, saw price as the determining element in their shopping decision.

While 75% of those living in homes constructed in the 1960's and 77% of those in post-1970 homes prefer to shop a home center, that still leaves a sizable number of homes built before 1960 whose homeowners, as the survey indicates, feel in-store service to be an important element in their shopping patterns.

For instance, of those respondents living in homes built before 1940, 42% chose service as the main reason for shopping a home improvement store. Demographic information shows that while 41% of all respondents residing in this home-type are retired, a full 31% are inexperienced or young professionals seeking how-to instruction and product knowledge as they renovate their domiciles.

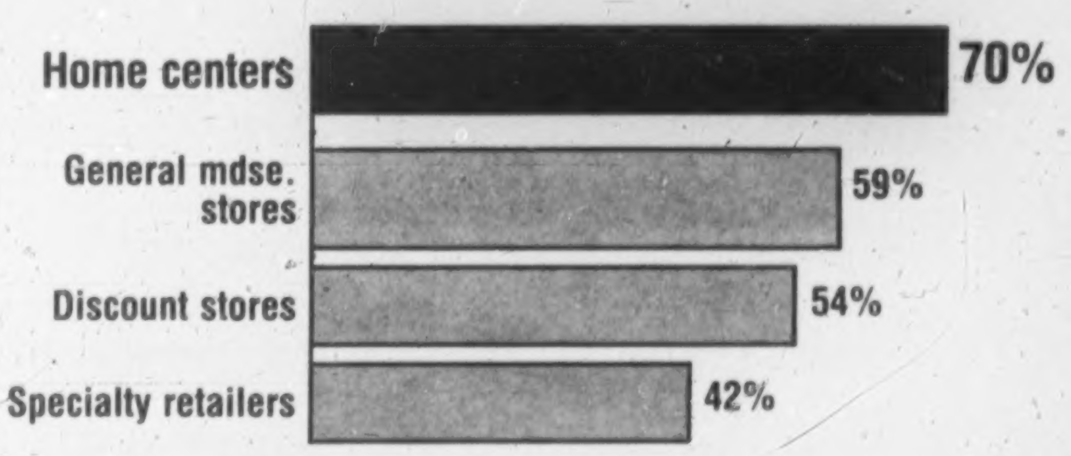
Service as a shopping factor diminishes among those respondents living in homes constructed from 1940 to 1969 (many of whom are skilled and semiskilled workers), but it picks up again with 31% of those living in post-1970 homes claiming service to be why they shop one store over another. In this home-type, professionals comprise 54% of the total.

However, the survey notes that only 31% of those respondents who shopped a home center primarily thought service to

(Continued on page 47)

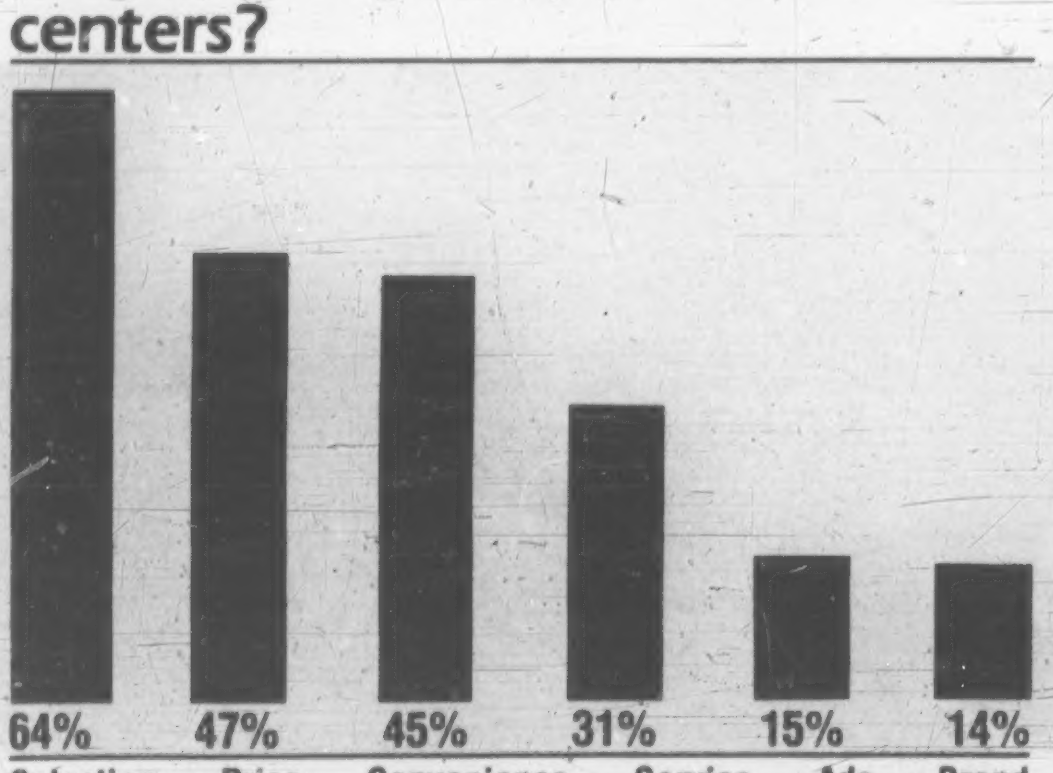
HOMEOWNER PROFILE

Where do homeowners shop for home improvement products?



HOMEOWNER PROFILE

Why do they shop at home centers?

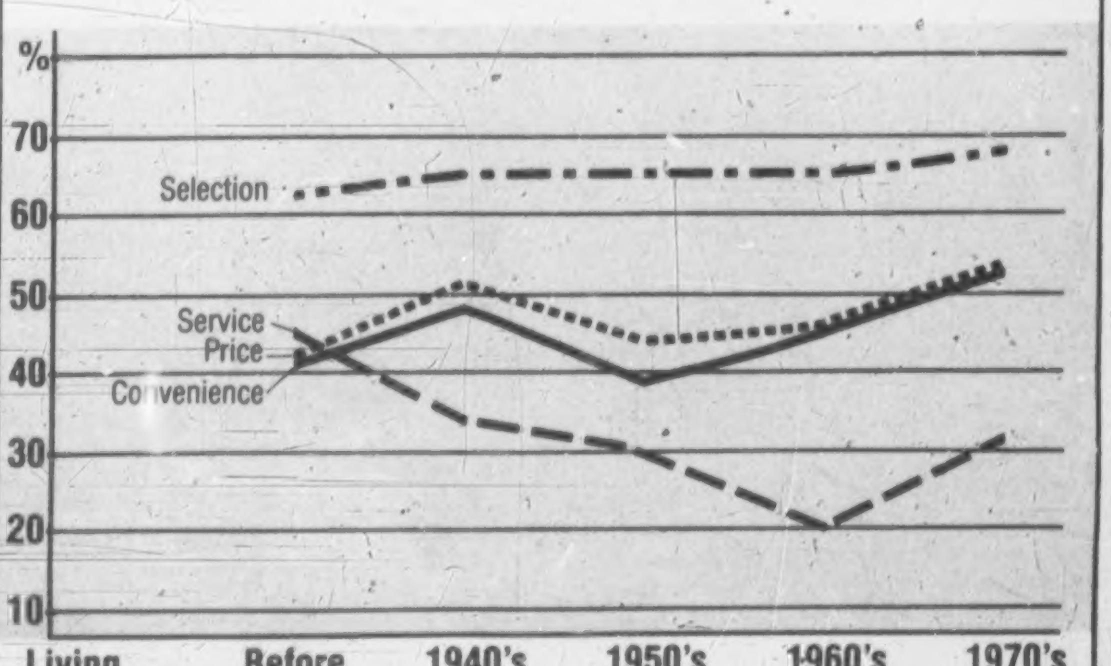


Selection outranks price and service . . .

Source: NHCN/NAHB research

HOMEOWNER PROFILE

. . . but service is more important to owners of older homes



DIY activity: A special report

DIY PRODUCT ANALYSIS

Energy conservation

Product	Bought	Will buy	Did install self	Will install self
Adhesives, caulk sealants	22.5%	6.6%	65%	72%
Weather stripping	19.9	5.3	63	70
Attic insulation	19.4	7.9	36	59
Storm doors	12.0	4.8	34	54
Storm windows	11.8	3.5	30	48
Water heater wrap	11.1	5.1	60	60
Pipe insulation	9.6	2.8	56	57
Exterior doors	9.0	3.8	41	61
Wall insulation	8.5	4.2	34	47
Thermostat	8.4	2.0	32	75
Floor insulation	4.8	1.1	41	44
Interior storm windows	4.4	3.3	39	44
Interior doors	3.7	1.5	40	75
Solar sun film	1.7	0.9	71	57
Solar hot water heater	0.6	1.1	60	44

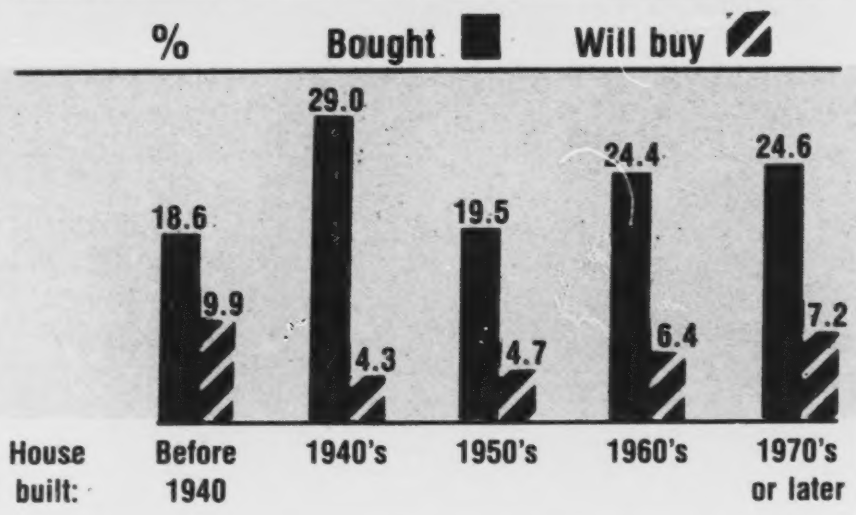
Source: NHCN/NAHB research

Reading the charts

Percentages in DIY product analysis charts are projectable to the nation's 44.4 million single-family, detached, owner-occupied dwellings. Each percentage point represents 444,000 households. In the column headings, bought refers to products purchased in the past 12 months; will buy to purchases planned for the next 12 months.

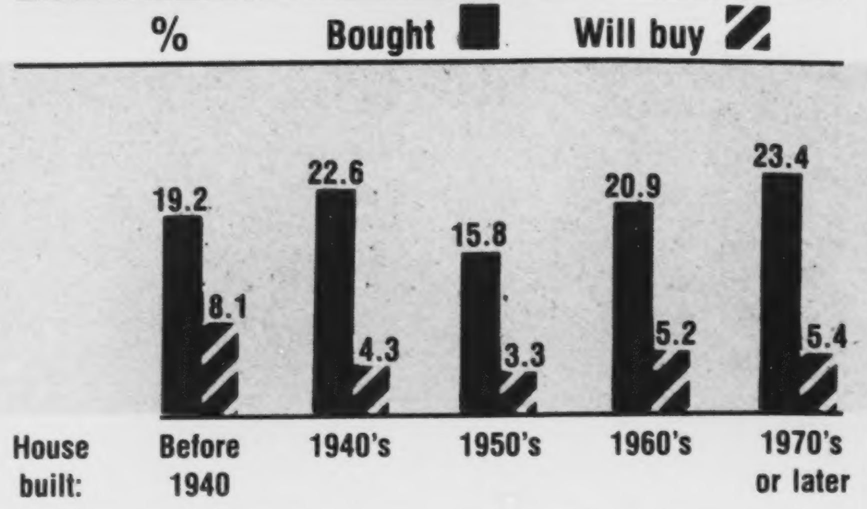
DIY PRODUCT ANALYSIS

Adhesives–Caulks–Sealants



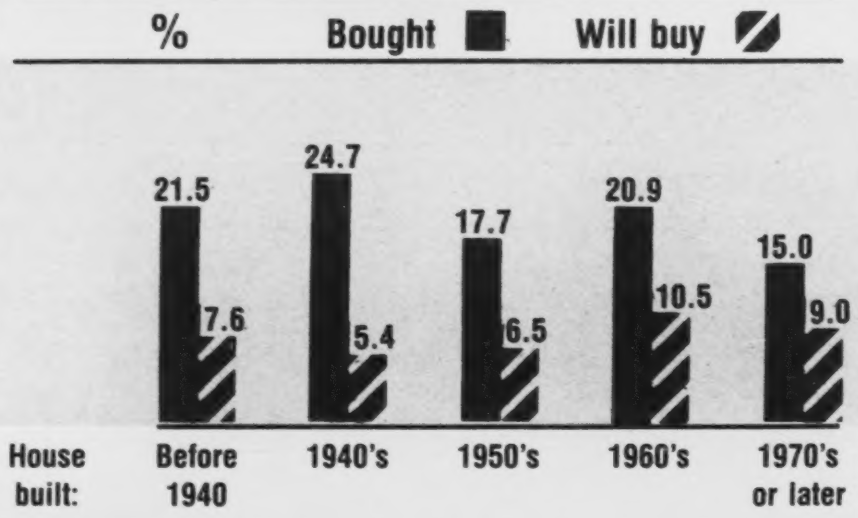
DIY PRODUCT ANALYSIS

Weather stripping



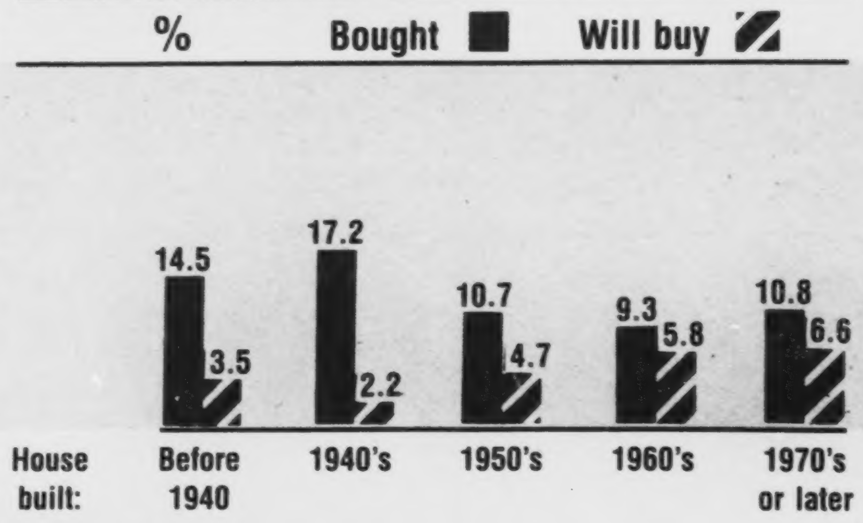
DIY PRODUCT ANALYSIS

Attic Insulation



DIY PRODUCT ANALYSIS

Storm Doors



Energy use still a major DIY concern

According to *NHCN*/NAHB's in-depth study of homeowner DIY activity, seven out of 10 respondents plan to improve the energy effectiveness of their homes.

Dissatisfaction with home insulation is partly responsible for this attitude. One-quarter of survey respondents who own homes built during the 1970's said they were unhappy with the energy effectiveness of their insulation and planned to add more.

That figure rises for homes built prior to 1970, to one-third, with 29% of owners of homes built before 1940 unsatisfied with the effectiveness of their insulation.

To improve the energy-efficiency of their home, 70% of respondents indicated they would add some form of insulation. However, when pressed for actual buying intentions, 7.9% stated they will buy attic insulation over the next year, with 58.5% of that group planning to install it themselves; 19.8% of the respondents had purchased attic insulation in the last year.

A distant second on the energy improvement list is changing windows/adding storm windows, with 27% of respondents planning these improvements.

The study indicated that storm windows were installed in 11.8% of all detached, single-family households last year, particularly those built prior to 1950; 29.9% of those respondents installed the windows themselves, while 48.3% of those planning to buy storm windows in the next year will install them on their own.

Storm doors were cited by 18% of respondents as a likely energy improvement; 12% actually bought the product during the past year and 4.8% plan to buy it. Of those groups, 33.7% installed the door themselves and 53.8% of the prospective buyers plan to do so.

Adhesives, caulks and sealants as a group were the most popular energy conservation products, with 22.5% of respondents having bought one of the products, although only 6.6%

(Continued on page 21)

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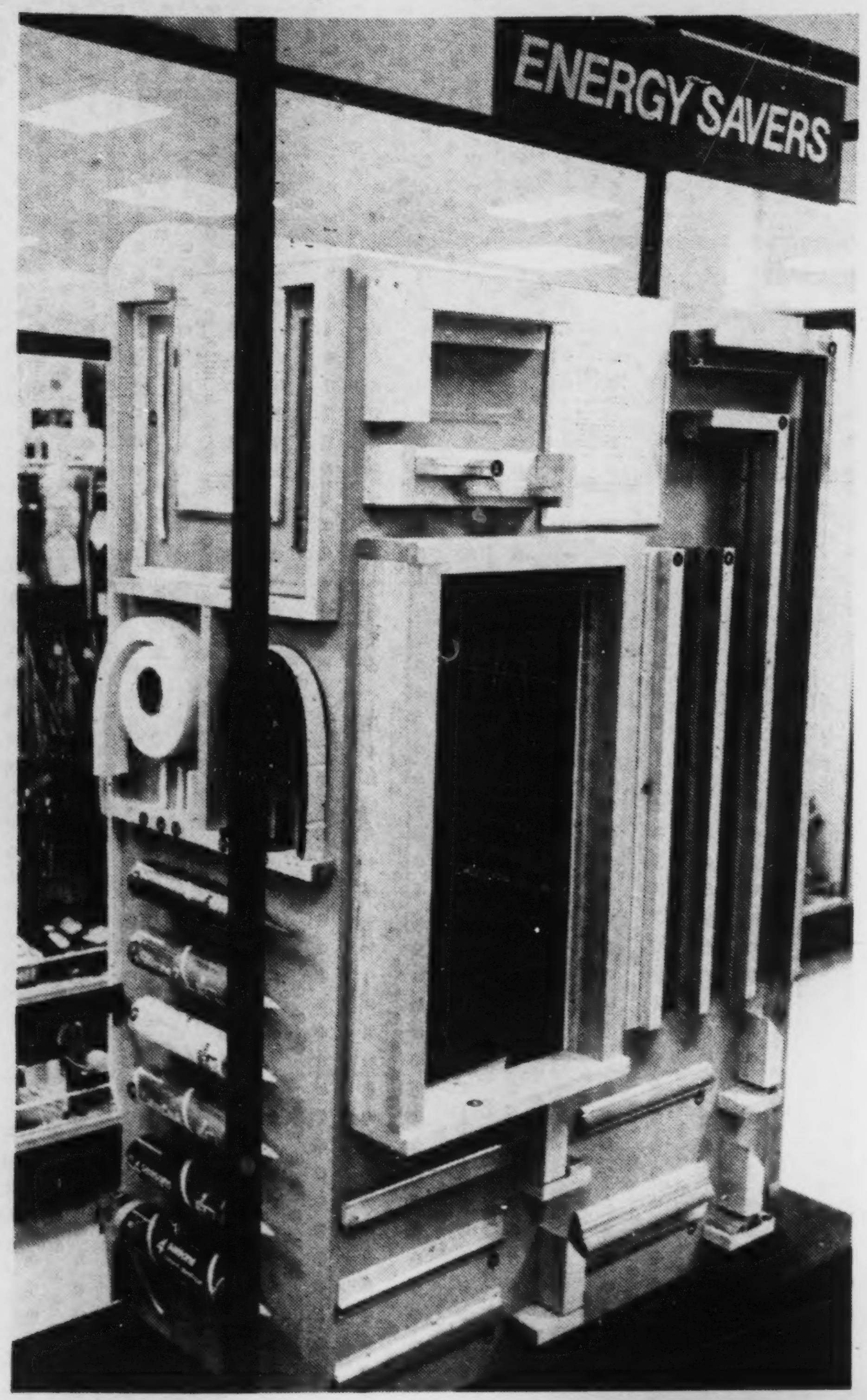
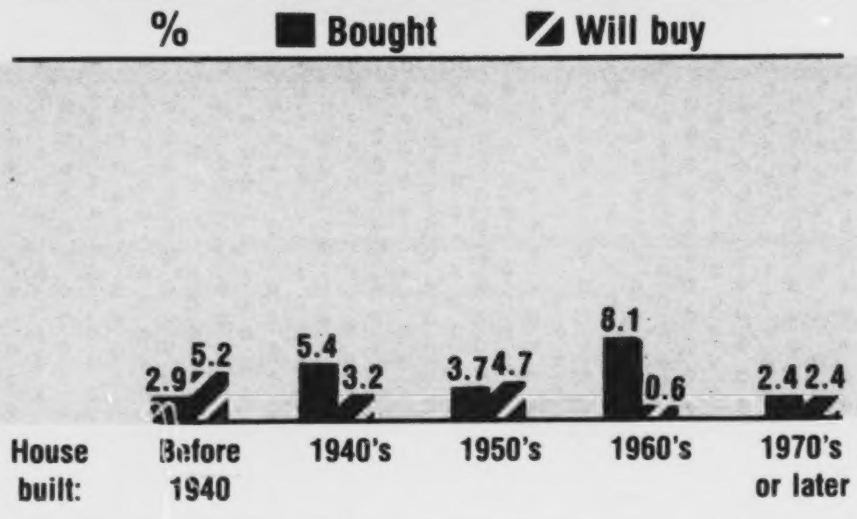
DIY activity: A special report



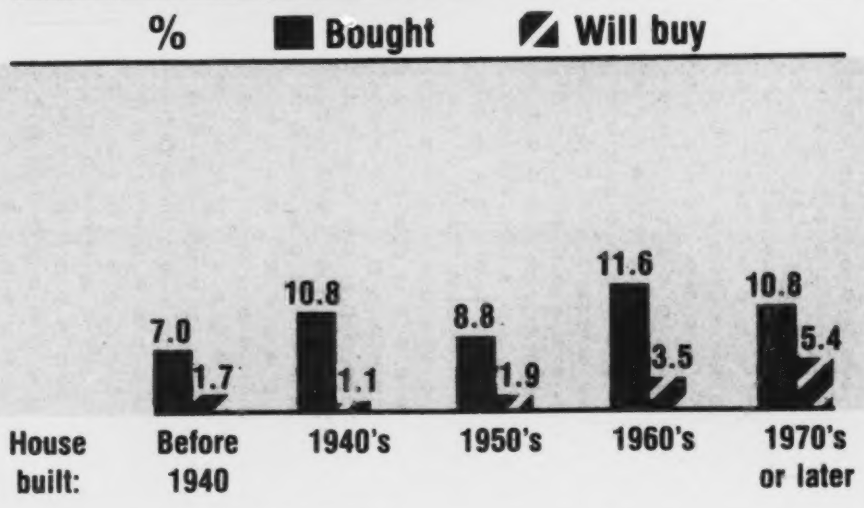
DIY PRODUCT ANALYSIS

Storm Windows—interior



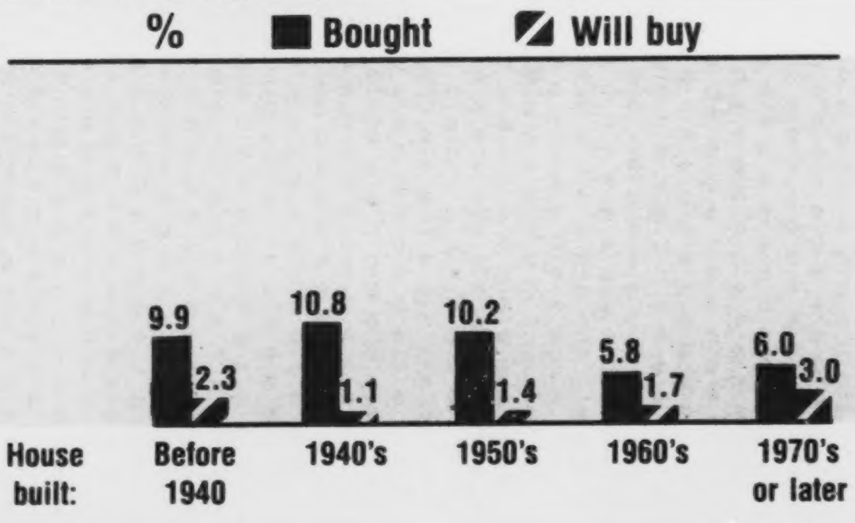
DIY PRODUCT ANALYSIS

Pipe Insulation



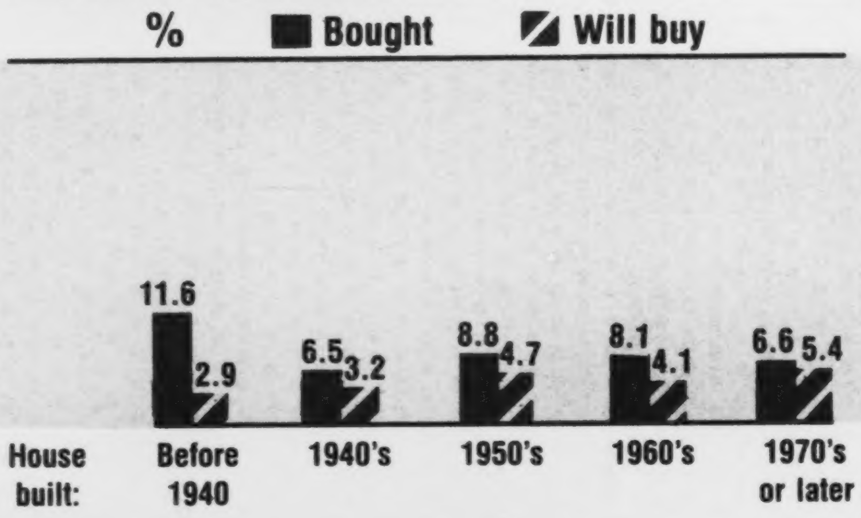
DIY PRODUCT ANALYSIS

Thermostats



DIY PRODUCT ANALYSIS

Wall Insulation



Energy use

(Continued from page 18)

indicated they would buy one in the next 12 months. One-quarter of those residing in homes built after 1960 bought adhesives, caulks or sealants in the past year, although the highest incidence of purchases (29%) was among those in homes built during the 1940's.

Weather stripping was purchased by 19.9% of respondents during the past year with an additional 5.4% indicating they will purchase the product in the next 12 months. Two-thirds of actual and potential weather stripping customers install the product themselves. The highest concentration (8.1%) of future buyers are in homes built before 1940.

Pipe insulation was purchased by 9.6% of the respondents, primarily for homes built after 1960. An additional 2.8% indicated they would buy pipe insulation in the next 12 months, with about 57% planning to install it themselves.

Water heater wrap was bought by 11.1% of respondents and installed primarily in homes built after 1940. An additional 5% plan to purchase the product, particularly those in 1970's-built homes, and 60% will install it themselves.

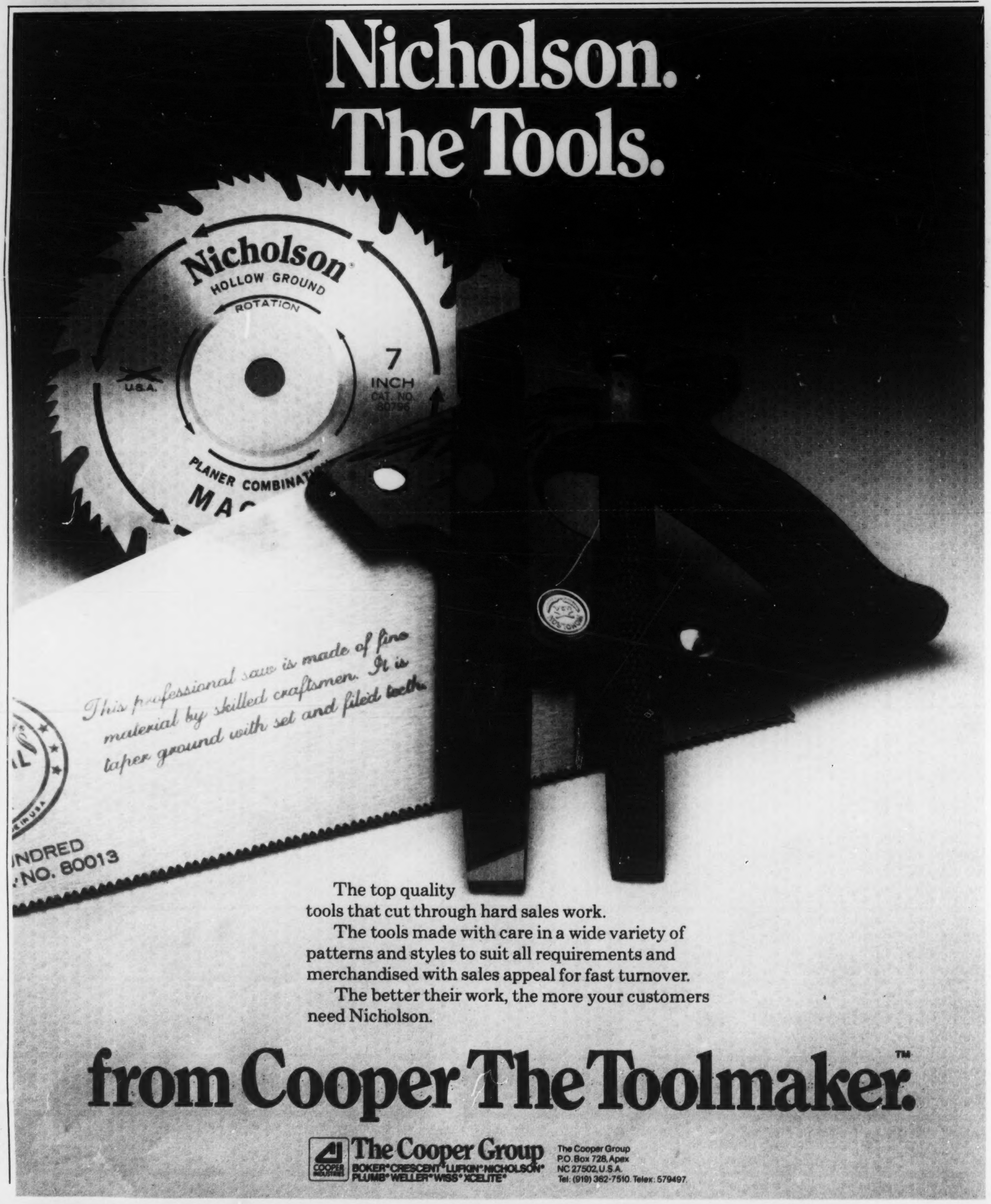
Wall insulation was installed primarily in homes built before 1940 and during the 1950's and 1960's; with 8.5% of respondents having purchased wall insulation during the past year and an additional 4.2% planning to do so. Among purchasers of wall insulation, 34.3% installed it themselves.

Thermostats appear to be most popular with owners of homes built before 1960. The device was purchased by 8.4% of respondents during the past year.

HOMEOWNER PROFILE

Where do you make energy improvements

Add insulation	**70%**
Change windows	**27%**
Add storm windows	**27%**
Add storm doors	**18%**
Add heat pump	**11%**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DIY PRODUCT ANALYSIS

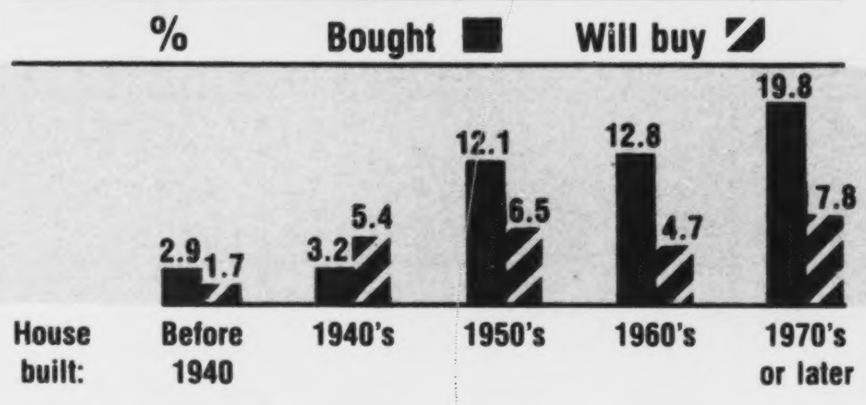
Heating and cooling

Product	Bought	Will buy	Did install self	Will install self
Gas water heater	12.3%	2.0%	28%	56%
Ceiling fan	10.9	5.3	58	51
Furnace	8.4	0.7	12	33
Central air-conditioner	7.3	1.3	12	18
Electric heater	7.3	0.7	22	—
Kerosene heater	5.9	2.1	33	41
Oscillating fan	5.7	1.3	23	46
Electric water heater	5.4	0.4	21	33
Room air-conditioner	5.0	1.7	44	43
Humidifier/dehumidifier:				
Portable	4.9	1.0	33	38
Central unit	4.3	0.7	23	17
Stove/fireplace	3.3	1.3	41	36
Quartz heater	3.2	0.5	31	50
Heat pump	1.5	0.5	—	—

Source: NHCN/NAHB research

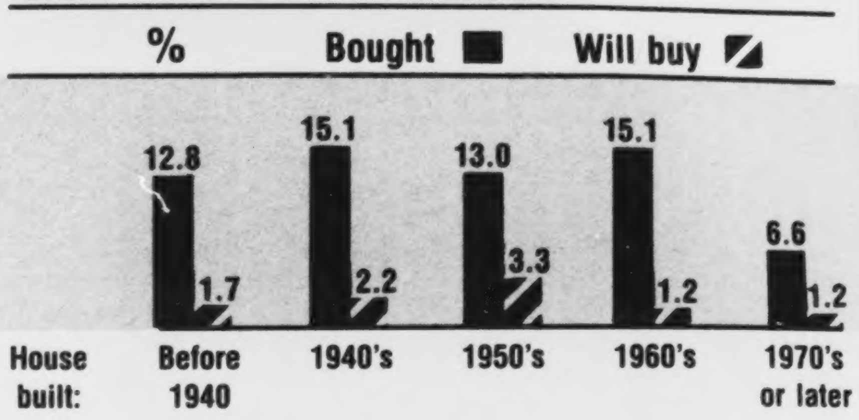
DIY PRODUCT ANALYSIS

Ceiling Fans



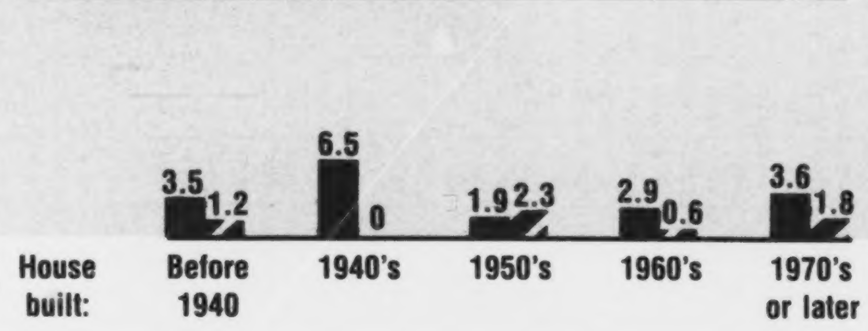
DIY PRODUCT ANALYSIS

Gas Water Heater



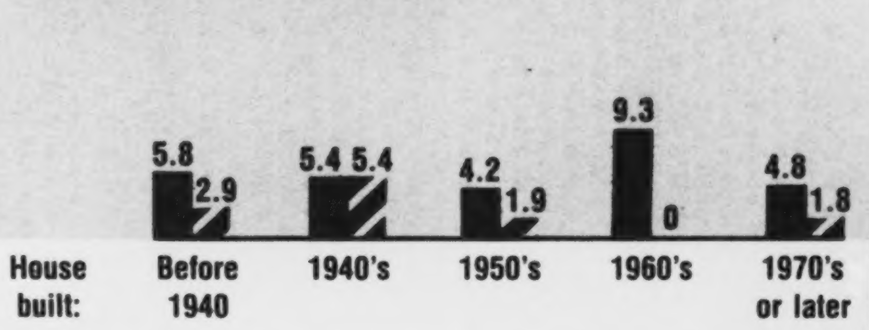
DIY PRODUCT ANALYSIS

Fireplace/stoves



DIY PRODUCT ANALYSIS

Kerosene Heaters



Ceiling fans a favorite in new homes

Ceiling fans seem clearly to be the favorite with new home owners according to the findings of *NHCN*/NAHB's survey of single-family homeowners.

Overall, 10.9%, or roughly 4.88 million single-family, detached, owner-occupied households bought a ceiling fan in the past 12 months. However, a closer look reveals that 19.8% of the homeowners living in homes built in the 1970's bought a ceiling fan, compared with only 12.8% and 12.1% of those living in homes built in the 1960's and 1950's, respectively, and a mere 2.9% of those living in homes built before 1940.

Part of the high incidence of fan purchases in newer homes is due to the fact that 45% of the homes built during the 1960's and 1970's were constructed in the South, where overall demand for ceiling fans is usually higher. Interestingly, while 1970's-built homes again rank first in planned purchases over the next 12 months, with 7.8% of the owners planning to buy a ceiling fan, owners of homes built in the 1950's, followed by those in the 1940's expressed the next highest degree of interest. More than half of the 5.3% who plan to purchase fans say they will install the items themselves; that compares to 58% who actually did install the fans on their own last year.

Meanwhile, among other heating and cooling products, changing a water heater was cited as the third most popular addition/alteration project tackled by DIYers in the past year; 4.3% of the respondents completed the project themselves and spent an average of $212 for the unit and accessories.

Gas water heaters bought by homeowners in the past 12 months were installed primarily in homes built before 1970. The highest proportion of potential gas water heater customers over the next year are in homes built during the 1950's, the study indicated.

Generally, respondents planning to purchase a gas water heater during the next 12 months are clustered in the $25,000-$35,000 income range.

Electric water heaters bought over the past year were primarily installed in newer homes built after 1960. Less than 0.5% of the respondents indicated they will buy an elec-

(Continued on page 23)

DIY PRODUCT ANALYSIS

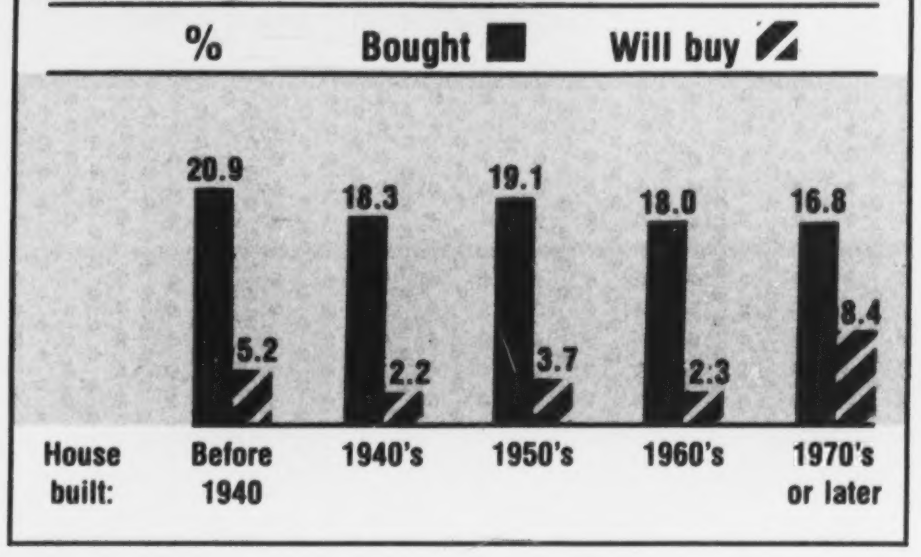
Electricals

Source: NHCN/NAHB research

Product	Bought	Will buy	Did install self	Will install self
Wiring, wall outlets	18.7%	4.5%	49%	62%
Fixtures	14.9	3.5	50	59
Phone jacks	14.0	2.2	34	39
Dimmer switch	12.8	2.4	63	75
Outdoor lighting	12.5	3.7	46	53
Switch plates	16.8	4.0	57	67

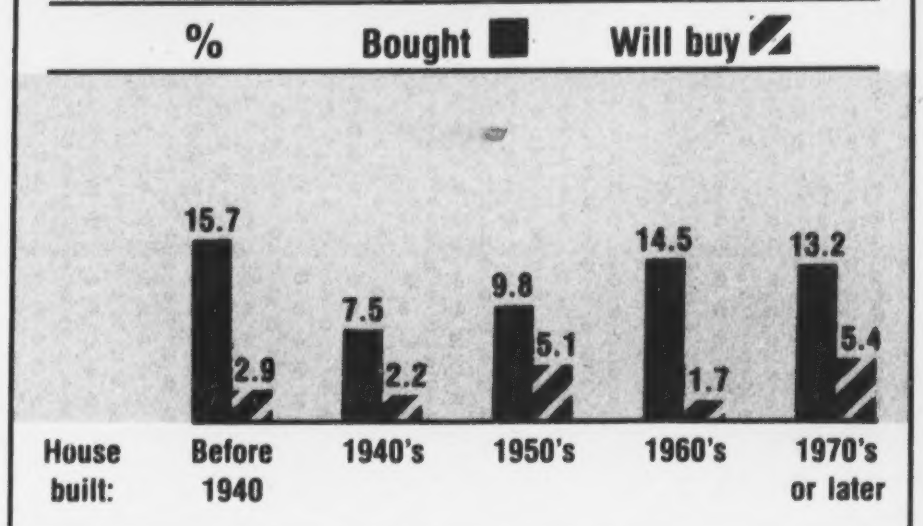
DIY PRODUCT ANALYSIS

Wiring & Outlets



DIY PRODUCT ANALYSIS

Outdoor lighting



Prewar homes lead electrical market

NATIONAL REPORT—Basic electrical items tend to be a staple in old and new homes, although new wiring and wall outlets tended to go into older homes, according to the *NHCN*/NAHB homeowner survey.

Close to one-fifth of the households in the survey bought wiring and wall outlets in the past year with the largest percentage going into homes built before 1940; 4.5% of all respondents plan to purchase these products in the coming year. The highest proportion of these projected purchases will be among those living in homes built in the 1970's (8.4%).

Outdoor lighting products were bought most often among occupants of prewar homes (15.7%) in the past year, followed by those living in homes built in the 1960's (14.5%) and the 1970's (13.2%). Owners of homes constructed after 1970 will buy more outdoor lighting in the next year than owners of older homes; 5.4% of those living in 1970's-built homes plan purchases, compared to 3.7% for all homes.

Households in the South reported a higher degree of outdoor lighting purchases than the West and North Central States.

Dimmer switches, on the other hand, are most popular with residents of modern homes: 16.8% of the respondents living in homes built in the 1970's bought dimmers compared to 12.1% for 1950's homes, 9.7% for 1940's homes and 11% for prewar homes.

Dimmer switches are clearly a DIY product: 62.9% of the installations were done by homeowners, and three-quarters of those planning to purchase dimmers in the next 12 months will install the item themselves.

Similarly more than half the lighting fixtures purchased last year were installed by their owners; and 59% of those planning purchases in the next year will install the fixtures themselves.

The age of the house seemed to have little influence on purchases of lighting fixtures. A total of 14.9% of households bought fixtures in the past year. However owners of homes built in the 1970's are clearly the leading market for sales in the next year (5.4% compared to 3.5% overall). This, in part, reflects the fact that newer homes are built with fewer lighting fixtures.

Fourteen per cent of the respondents to this survey purchased telephone jacks in the past year. Telephone jacks were purchased more often by homes in the South and homes built before 1960 than older homes. Only about a third of the installations were completed by the homeowners.

Sales of switch plates were concentrated in homes built in the 1940's and 1950's. The survey showed 19.4% of the homes built in the 1940's bought switch plates compared to 16.8% overall. Two-thirds of the switch plate purchases over the last 12 months were DIY installed.

Ceiling fans

(Continued from page 22)

tric water heater during the next year, compared to 2% who plan to buy a gas water heater.

Heat pumps, which were bought by 1.5% of responding households, were installed primarily in homes built after 1960.

Again, only 0.5% of the respondents indicated they will buy a heat pump in the next 12 months.

Among portable heaters, kerosene models will show the greatest growth over the next 12 months, with 2.1% of the respondents indicating they will buy a kerosene heater during that period, compared to 0.7% for electric heaters and only 0.5% for quartz heaters. For owners of homes built in the 1960's, 9.3% bought a kerosene heater last year, compared to only 4.8% in homes built after 1970.

Owners of homes built during the 1940's appear to be the most likely market for kerosene heaters, according to survey results.

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DIY activity: A special report

DIY PRODUCT ANALYSIS

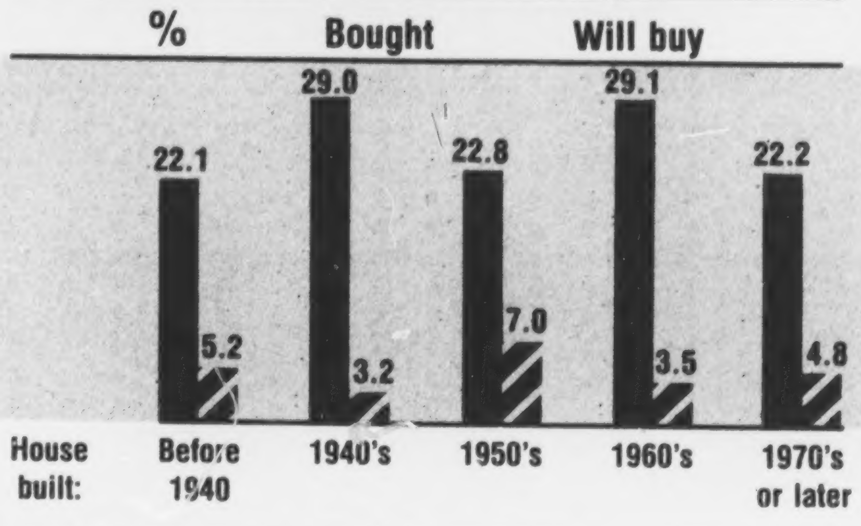
Security hardware

Product	Bought	Will buy	Did install self	Will install self
Smoke detectors	24.5%	5.0%	56%	68%
Door locks	19.3	5.5	48	64
Timers	11.6	1.5	60	75
Fire extinguishers	10.0	2.3	56	79
Alarm systems	5.1	2.1	31	82
Burglar bars	2.3	0.6	16	100
Safe	1.8	0.9	53	71

Source: NHCN/NAHB research

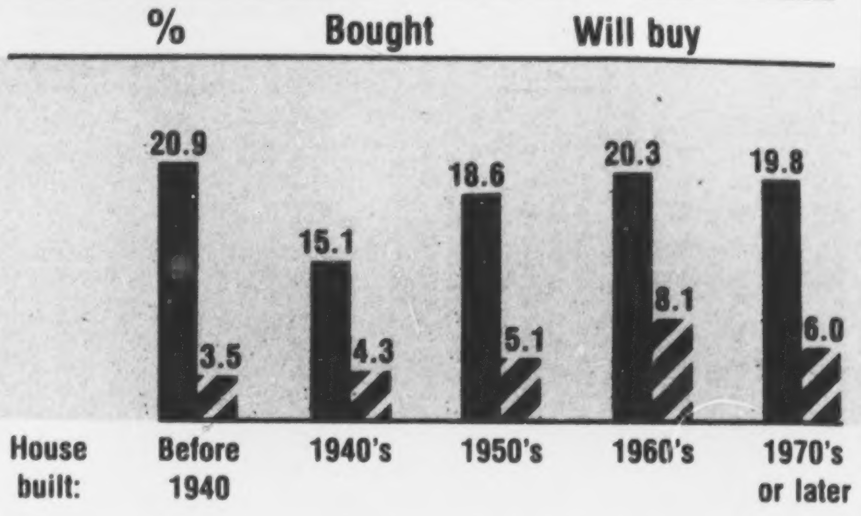
DIY PRODUCT ANALYSIS

Fire/Smoke detectors



DIY PRODUCT ANALYSIS

Door Locks



Older homes dominate door lock market

Retailers should anticipate strong sales of door locks and smoke detectors over the next 12 months.

According to findings from the *NHCN*/NAHB homeowner survey, smoke detectors will be purchased for older homes by a relatively older consumer, while door locks, which could become the No. 1 selling security product in home centers next year, seem to appeal to those homeowners living in newer homes.

These facts on security hardware were culled from the *NHCN*/NAHB consumer survey conducted last year among 8,000 single-family detached, owner-occupied homeowners.

Of the 900 respondents answering the survey, 24.5%, or an estimated 10.9 million of the 44.4 million households of this kind, purchased a smoke detector over the last 12 months, with 55.7% of these installing the item themselves. Some distinguishing footnotes about these purchases include the fact that homeowners living in homes built in the 1940's and 1960's made up the two largest percentages of those buying the product, and of those respondents 65 or older, 30.9% bought the product.

However, it appears that homeowners living in homes built in the 1950's will be the most likely purchasers of smoke detectors over the next 12 months; 7% of those 35-44 years old claiming they will buy the product within the next year, the highest response rate in any single age group.

Door locks are another story. According to the survey, 20.9% of the respondents living in pre-1940 homes bought locks in 1981, compared with 15.1% living in homes built during the 1940's. Another 20.3% of those in homes built in the 1960's and 19.8% in dwellings constructed after 1970 made door lock purchases. New home owners, however, will be the primary buyers in the coming year: 8.1% and 6% respectively said they would buy the product for their homes built in the 60's and 70's, higher than any other group.

High volume eyed

Door locks showed particularly strong sales strength in the East South Central and Pacific regions of the country last year, with the highest percentage of DIY activity coming from those living in the West North Central area, where 000-$49,999 comprised the highest percentage of those who bought these products over the last year.

Respondents living in homes built in the 1940's gave the highest response rate (12.7%) when asked whether they bought a fire extinguisher last year. And in the alarm systems category, it appears from the survey's census data that respondents in the East- and West-South Central regions made up the strongest consumer base.

70.6% of those who bought door locks installed the items themselves. An estimated total of 8.56 million households purchased door locks over the past 12 months, with an additional 2.4 million projected to buy the product over the next year.

It is also interesting to note that, of those respondents 65 and over, 22.9% said they bought a door lock last year, while the highest percentage of "will buy" comes from the 45-54 year old group, with 70% indicating they would also install the product themselves.

Perhaps the most surprising finding in the survey shows waning consumer interest in light timers. While 11.6% of responding households purchased these products over the last 12 months, only 1.5% of all the sur-

(Continued on page 26)

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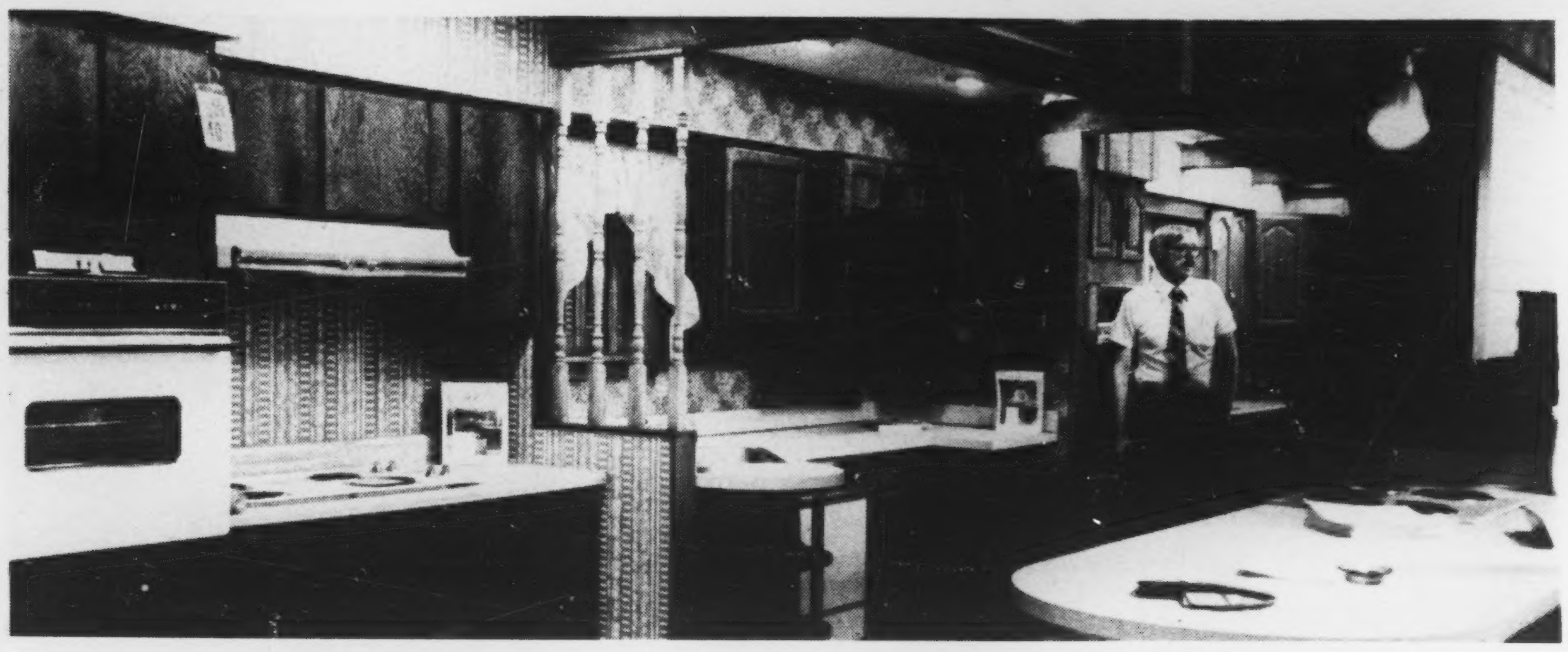


DIY PRODUCT ANALYSIS

Kitchen

Source: NHCN/NAHB research

Product	Bought	Will buy	Did install self	Will install self
Counter tops	10.6%	4.3%	22%	49%
Range hood/exhaust fans	9.2	2.6	31	67
Kitchen cabinets	9.0	2.4	15	40
Garbage disposals	10.3	2.4	41	40

Kitchen remodeling tops DIY project list

Kitchen remodeling was cited as the No. 1 DIY alteration project in *NHCN*/NAHB's homeowner survey with 5.1% of the sample, equivalent to 2.26 million households, completing the job on their own over the past 12 months.

DIYers, on average, spent $1,550 on the project which, projected nationally, totaled $3.5 billion.

Counter tops were the most popular kitchen product purchased, with 10.6% of the respondents having bought one in the past year and an additional 4.3% expecting to do so in the next 12 months.

Counter tops were more often installed in older homes, specifically in 15.1% of the homes built during the 1940's, and in 14% of the homes built before 1940 compared to only 6% of the homes built in the 1970's.

Range hoods and exhaust fans were purchased by 9.2% of respondents, with an additional 2.4% indicating that they would buy one or the other product in the next 12 months. Of those who purchased the products, 30.7% stated that they installed one of the units themselves, while more than twice that figure planned to do so among those planning a future purchase.

Most hoods or fans were purchased by owners of homes built before 1960.

Kitchen cabinets meanwhile were purchased by approximately 4,000,000 single-family homeowners last year, or 9% of the respondents. Only 14.9% indicated they installed the cabinets themselves, however.

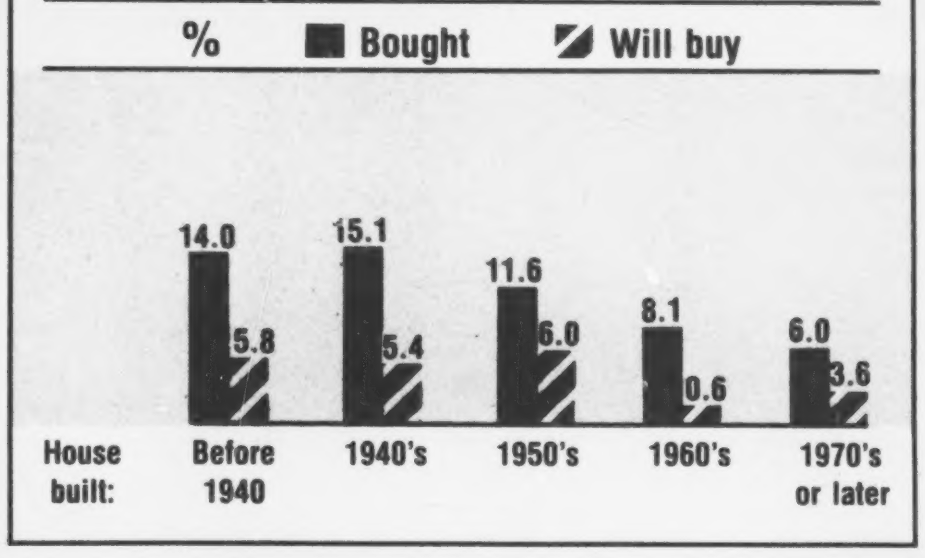
Most cabinet purchases went into older homes, reflecting greater remodeling work: 12.9% of the owners of homes built in the 1940's, for example, and 11.6% of homes built before 1940 bought cabinets, compared to 6.4% for 1970's-built homes.

Most prospective purchasers of cabinets live in homes built before 1950, with 5.4% of 1940's-home owners planning purchases compared to 1.2% for homes built in the 1960's and 1970's, and 2.4% for all homes.

Garbage disposals continue to generate strong sales activity with 10.3% of the survey's respondents reporting they had purchased the item in the past year, and 2.4% planning to buy in the coming year. About 40% of those who bought a garbage disposal installed it themselves.

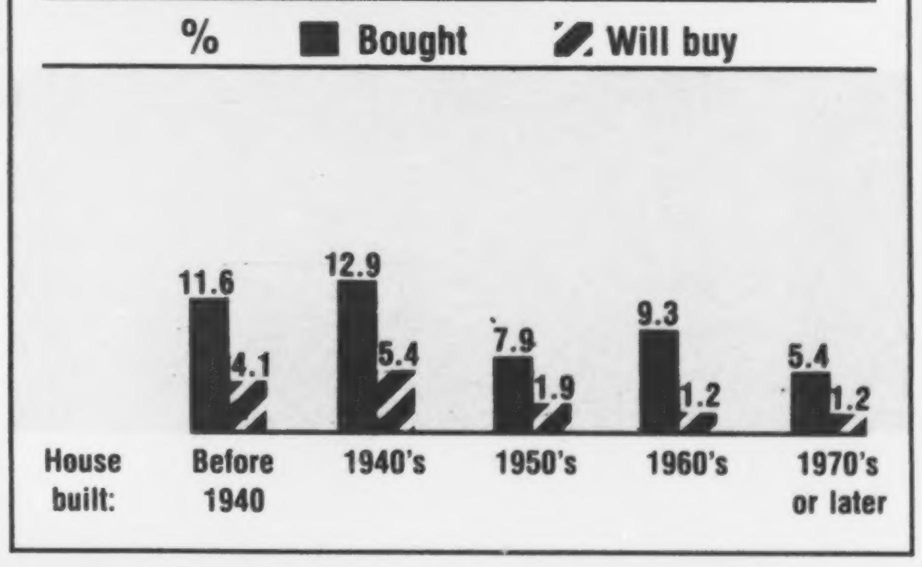
DIY PRODUCT ANALYSIS

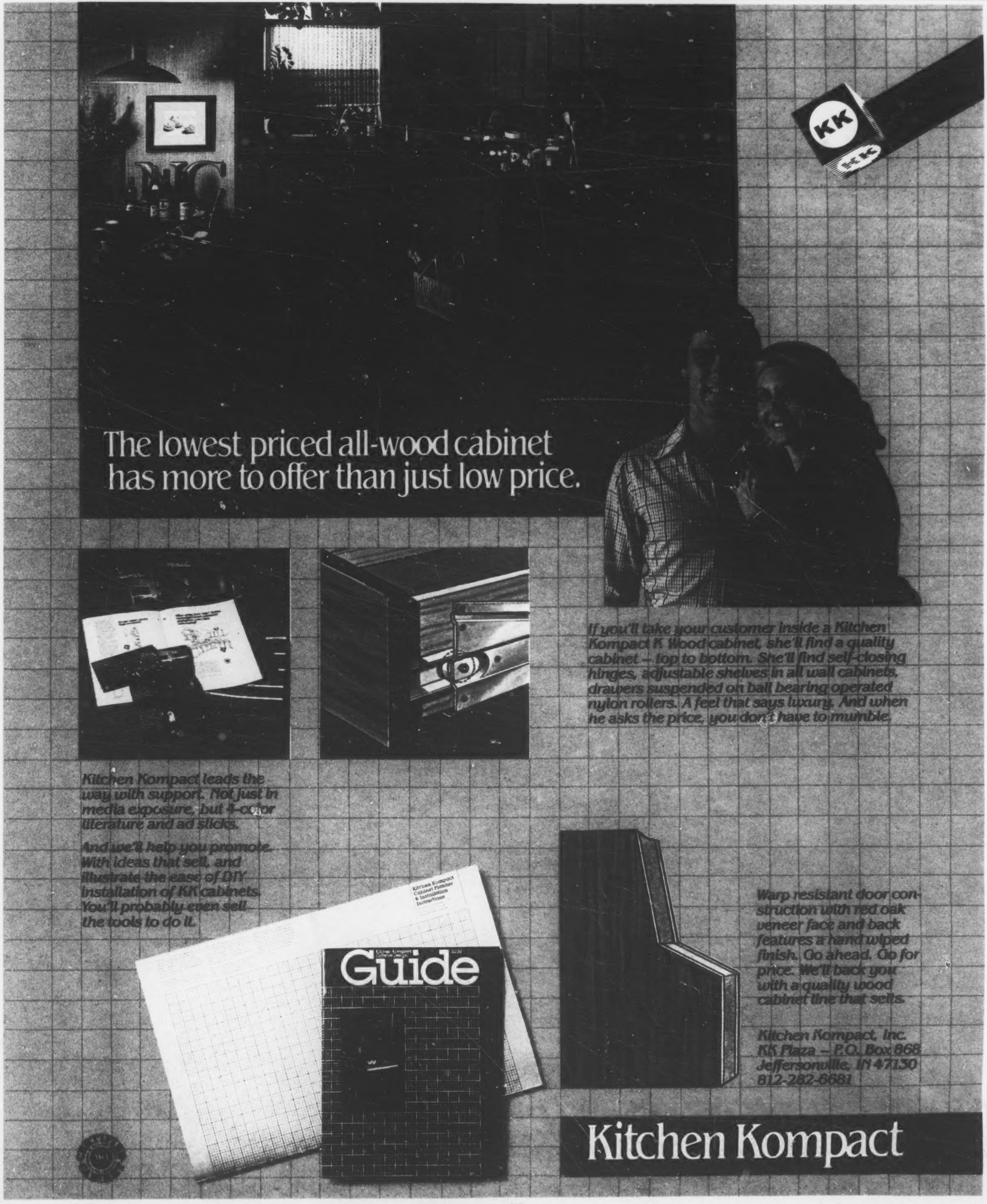
Counter Tops



DIY PRODUCT ANALYSIS

Kitchen Cabinets

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Door locks

(Continued from page 24)

vey's respondents will be buying a timer through the next 12 months. The highest response rate came from homeowners living in 1950-59 era houses, of which 14% bought a timer last year. But within this home-type, only 1.9% will purchase the product next year, this representing the greatest response rate among all home-type groups. The sharp drop in interest is, in part, due to the tendency of homeowners to plan conservatively in the current economy.

There was also relatively little interest in either burglar bars or safes, with only 0.6% and 0.9% of the respondents planning purchases, respectively.

There was noticeably more interest in alarm systems and fire extinguishers, although these still make up a small part of total security volume.

DIY PRODUCT ANALYSIS

Plumbing

Source: NHCN/NAHB research

Product	Bought	Will buy	Did install self	Will install self
Faucets	21.9%	6.0%	50%	53%
Toilet seat	21.4	5.6	53	70
Massage showerhead	10.6	2.3	63	58
Sink	9.9	3.1	32	48
Toilet	9.2	2.4	37	35
Mirror	9.0	2.7	46	68
Metal pipe	8.7	2.1	44	65
Plastic pipe	8.4	2.8	49	65
Water saver showerhead	8.3	2.9	59	46
Vanity	7.7	2.7	46	64
Shower/tub kit	5.9	3.2	38	69
Shower door	5.0	2.3	46	42
Water purifier	2.2	0.6	56	20

Faucets top list for plumbing DIYers

While the traditional correlation between the age of a house and the need to install new plumbing still exists, a number of plumbing products seem to buck tradition.

Residents of pre-1950 dwellings will continue to make up the bulk of the consumer mix for such fare as shower/tub kits, plastic and metal pipe and vanities. However, some of the best-selling plumbing items in 1981—faucets and massage showerheads—are now generating the greatest interest among consumers living in post-1970 homes.

According to the nationwide *NHCN*/NAHB consumer survey, 21.9% of the respondents (equal to about 9.72 million single-family, detached homes) bought faucets in 1981. Homeowners living in dwellings built before 1940 showed the greatest buying percentage, 27.3%.

However, of the 6%, or 2.66 million households, who said they would buy a faucet over the next 12 months, the greatest activity is projected to be in homes constructed after 1970, with 8.4% of those home-type respondents saying they will purchase a faucet in 1982.

Of those contemplating a faucet purchase, the peak buying group had an income of $20,000-$49,999.

Another product that has bucked the age-of-home trend is the massage showerhead. The greatest percentage of buyers came from those living in post-1970 homes, with 13.8% of these buying this product in 1981; another 4.2% in that group plan to buy a massage showerhead over the next 12 months. Of those planning to purchase this product over the next year, 57.9% will install it themselves.

Plumbing ranked 10th among the most important interior DIY projects completed in the past 12 months, with a total of 0.6%, or 266,400 households, that bought plumbing products indicating they installed items themselves.

For shower/tub kits, of the projected 2.61 million households that bought the product in 1981, homeowners living in pre-1940 homes showed the highest buying percentage at 8.1%. The same holds true for plastic plumbing. Of an estimated 3.74 million households, or 2.8%, that bought plastic pipe last year, those living in pre-1940 homes showed the highest percentage of purchases at 14%, with 62.5% of those owners doing the job themselves.

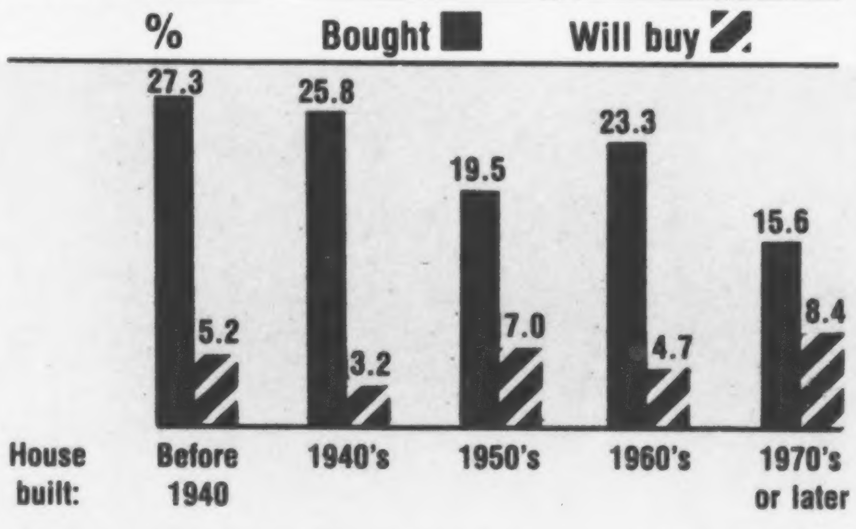
A substantially higher amount of plastic pipe was sold in the East North Central states than in any other region.

Another product that showed strong activity in older homes was vanities. A total of 9.9% of

(Continued on page 29)

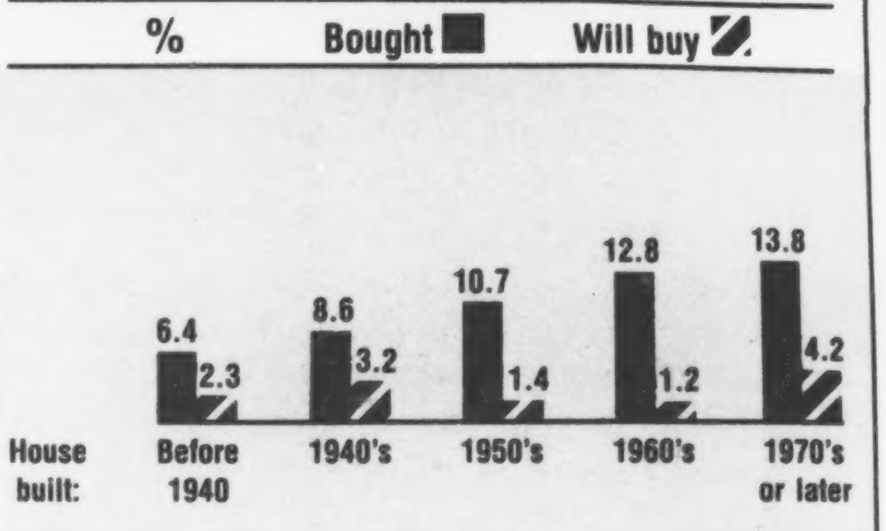
DIY PRODUCT ANALYSIS

Faucets



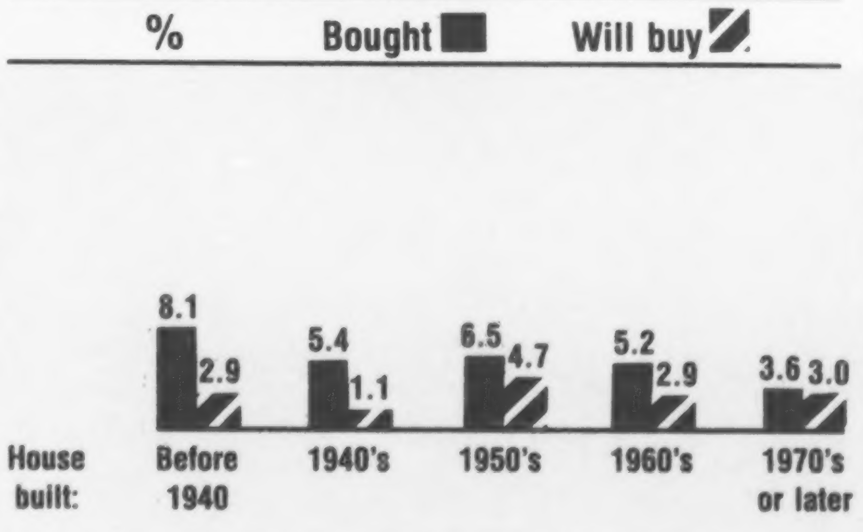
DIY PRODUCT ANALYSIS

Showerhead-Massage type



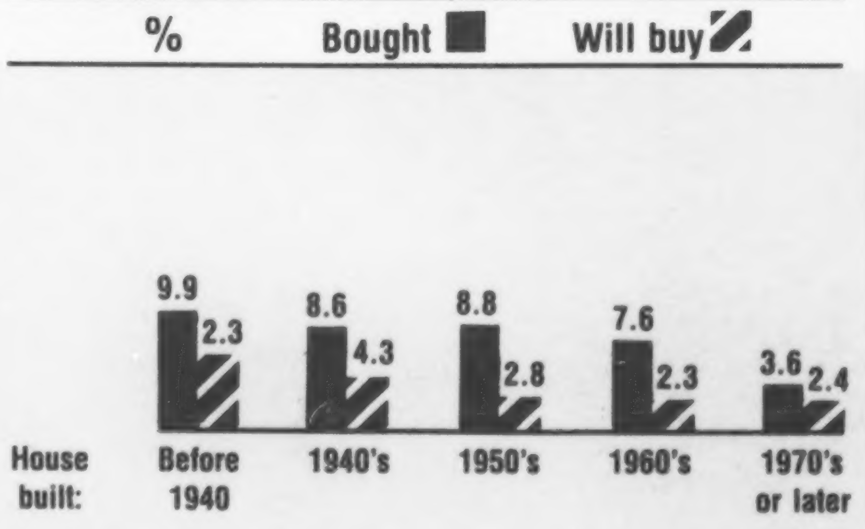
DIY PRODUCT ANALYSIS

Shower/tub kit



DIY PRODUCT ANALYSIS

Vanities



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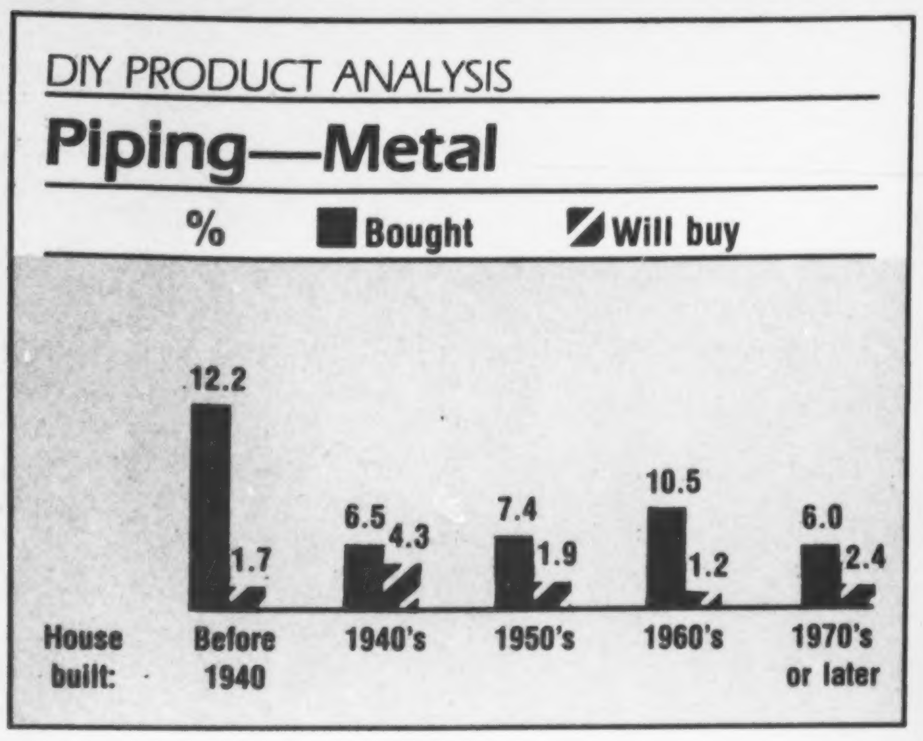
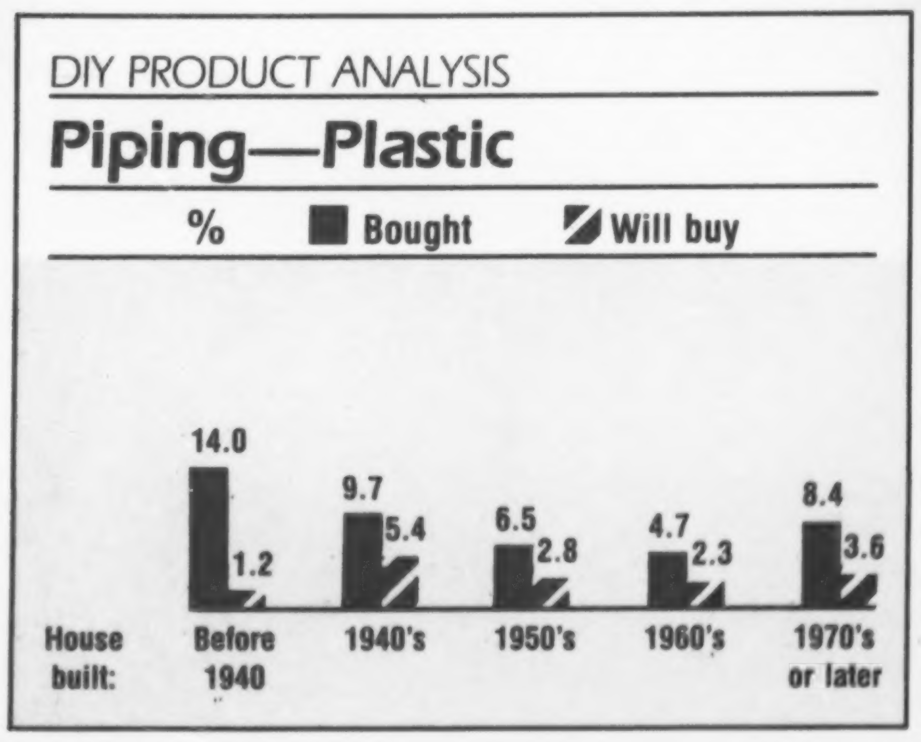
DIY activity: A special report





Faucets top list

(Continued from page 28)

the respondents living in pre-1940 homes made a vanity purchase in 1981 (the biggest percentage in this product group); 4.3% of those living in homes constructed in the 1940's said they would buy a vanity over the next 12 months. In addition, it appears the peak buying group for this product has a household income range of $35,000-$49,999.

Interestingly, for respondents who bought metal pipe and sinks during the last 12 months, the greatest percentage in each product category by age of head of household was from the 65 and older group (9.4% and 11.7% respectively).

While 30% of the survey respondents are in this age group, they are not afraid to tackle plumbing jobs.

Metal pipe still seems to attract the higher income bracket with 11.4% of the $35,000-$49,999 group buying metal pipe last year. Sinks will apparently be bought over the next year in the greatest quantities for homes that were built in the 1950's.

The survey showed sporadic activity for items like water purifiers, shower doors and water-saving showerheads. But the plumbing product that looks to have the greatest staying power is the toilet seat. Some 9.5 million households purchased a seat within the last 12 months and another 2.49 million will be buying the product over the next year, according to the survey.

CALENDAR

July 25-28
Belknap's 18th Annual Dealer Market, Louisville, Ky.

July 31-Aug. 2
Southwestern Craft & Hobby Show, Market Hall, Dallas.

Aug. 6-8
Sentry Hardware Dealer Merchandise Market, Municipal Auditorium, Nashville.

Aug. 7-8
Ohio Valley Hardware's Fall Dealer Market, Vanderburgh County Civic Auditorium Gold Room, Evansville, Ind.

Aug. 15-19
National Hardware Show, McCormick Place, Chicago.

Aug. 21-22
Amarillo Hardware's Fall Red Carpet Buyer's Market, Amarillo Civic Center, Amarillo, Tex.

Aug. 22-25
Sealed Insulating Glass Manufacturers Assn. 1982 Summer Meeting, Radisson South Hotel, Minneapolis.

Sept. 9-10
Annual Fall Buying Market and Convention, Progressive Affiliated Lumbermen, Traverse City Hilton, Traverse City, Mich.

Sept. 12
Yakima Hardware Annual Dealer Market, Yakima Convention Center, Yakima, Wash.

Sept. 15-17
Florida Lumber and Building Material Dealers Assn. 62nd Annual Convention and Exposition, Orlando Hyatt Hotel, Orlando, Fla.

Sept. 25-26
L. G. Cook Distributor, Annual Hardware Buyer's Market, Grand Center, Grand Rapids, Mich.

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DIY PRODUCT ANALYSIS

Wall decor

Source: NHCN/NAHB research

Product	Bought	Will buy	Did install self	Will install self
Paint	39.3%	15.1%	62%	70%
Wall paper	21.1	7.9	63	54
Stain	10.6	3.2	62	65
Molding	10.4	3.2	69	81
Paneling	9.8	3.8	61	71
Tile	6.3	2.9	37	50
Brick/stone	4.4	1.3	28	46
Cork	0.9	0.4	43	100

Paint cops No. 2 spot among DIY purchases

DIYers rank painting a room as the most important project completed last year.

According to the new *NHCN*/NAHB survey 3.4% of the nation's single-family, detached households or 1.5 million homes were involved in an interior painting project during the past 12 months.

Paint was the second most popular home improvement product last year, after seed and fertilizer, bought by 40% of the respondents. Some of the product was, of course, for exterior use.

Wall decor products tend to be strongly DIY. Of respondents who applied paint, 67% did it themselves. The corresponding figure for wallpaper is 63%; for paneling, 61%; for molding, 69%.

The survey also found that paneling is more popular in older homes, while wallpaper is favored in newer ones. Paint found buyers in houses of all ages. Other wall decor alternatives, like brick, stone and cork, are substantially less popular.

Among respondents occupying prewar homes, 12.2% bought paneling in the past year, as did 11.8% of those owning homes built in the 1940's and 10.7% with homes built during the 1950's. In contrast, the percentages for homes constructed during the 1960's and 1970's were 7% and 7.8% respectively.

While wallpaper is more even in popularity measured against the age of the home, it tends to be bought more often for newer homes. Of respondents living in homes built since 1970, 27.5% bought wallpaper in the past 12 months. For respondents living in homes built during the 1960's the figure drops to 22.7% and for those living in 1950's homes it declines again to 17.2%.

The figures for pre-1940 homes and those built during the 40's are slightly higher, 18% and 21.5% respectively, possibly reflecting a style preference in older homes.

Molding was a relatively popular purchase for homeowners with homes built during the 1940's; 15.1% made the purchase, perhaps correlating with the popularity of paneling in homes of that vintage.

Brick and stone was bought by only 4.4% of the respondents, a relatively low number although it still translates into a market of almost two million. The same is true for cork, purchased by 0.9% of respondents or a market of about 400,000.

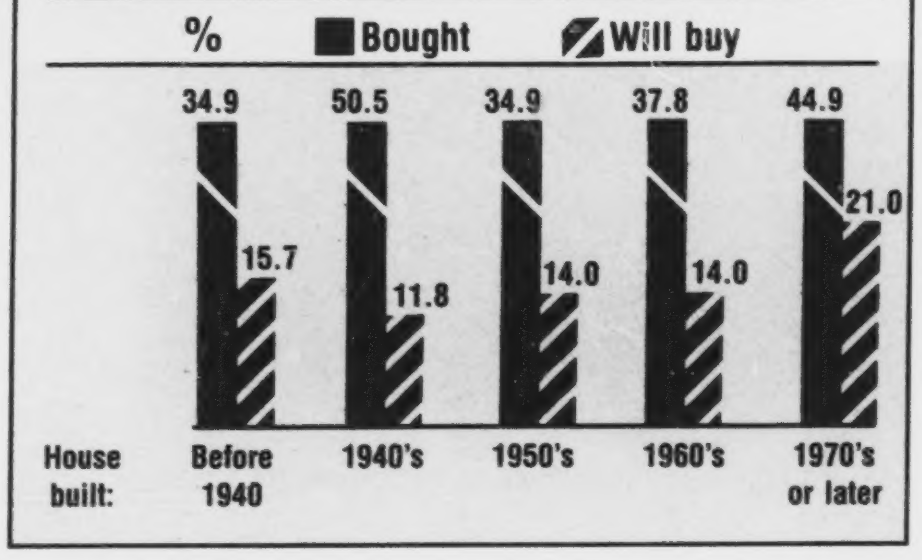
Wall tile was predictably bought most often by respondents living in houses built in the 1940's and earlier, when ceramic kitchen and bath walls were popular. However, survey results also show possible interest among high income groups and young homeowners, perhaps more receptive to a particular fashion trend.

Correction

An article appearing in the May 10 issue of *NHCN* indicated that the home use of kerosene heaters in Arizona was prohibited. According to the state fire marshal, the sale and use of the heaters is permitted "if UL approved and installed properly according to instructions."

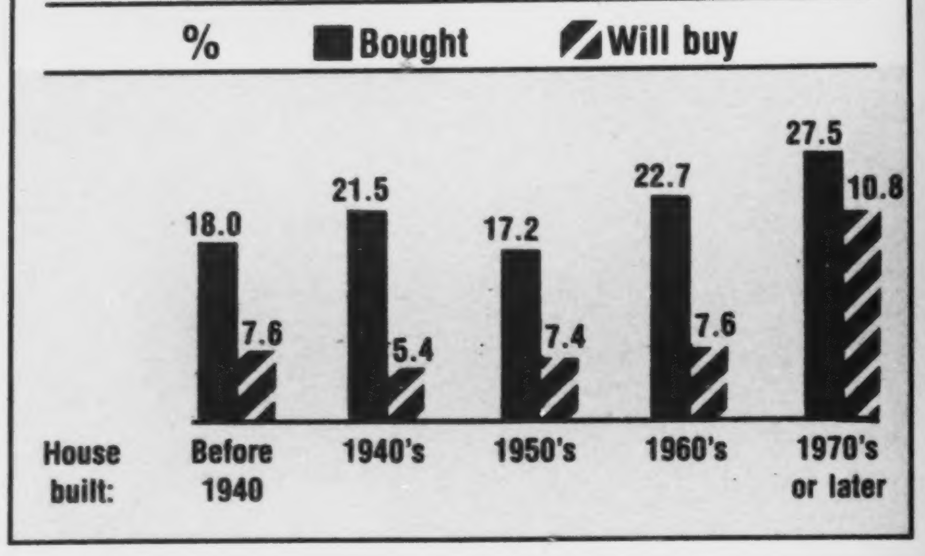
DIY PRODUCT ANALYSIS

Paint



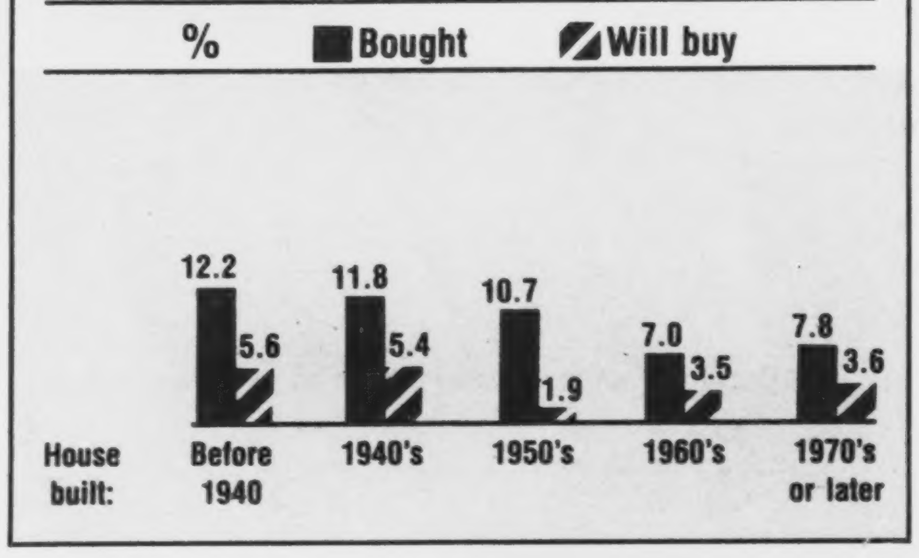
DIY PRODUCT ANALYSIS

Wallpaper



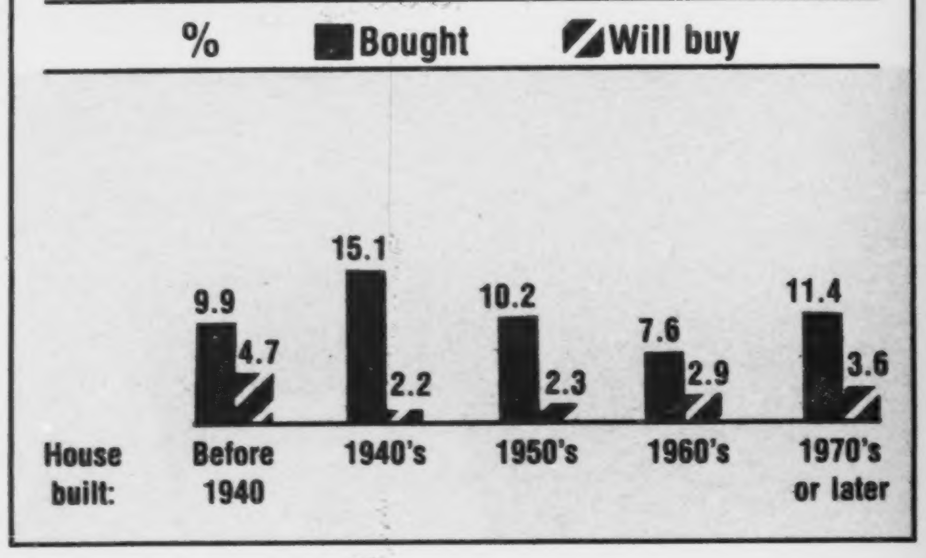
DIY PRODUCT ANALYSIS

Paneling

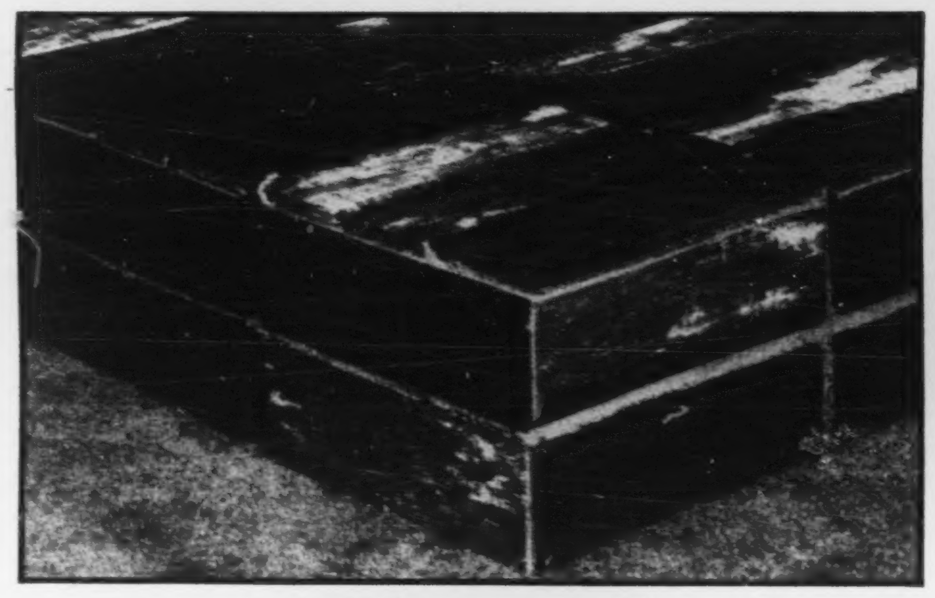


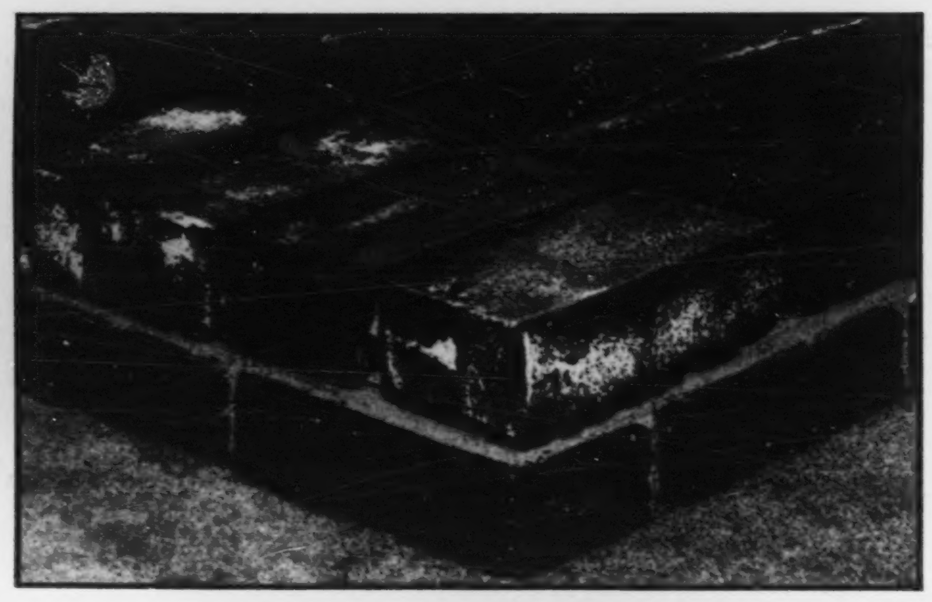
DIY PRODUCT ANALYSIS

Molding



K-Lux Decorative Brick
It's unbelievably believable.


Z-Brick®*


K-Lux Brick®*

A New Color: K-Lux Tan Benchmark® to go with our popular K-Lux Red Benchmark®

K-Lux Decorative Brick is in a class by itself. Compared to other decorative brick, it looks unbelievably believable. Custom molded corners require no cutting and no mitering and enable an amateur to do a professional job.

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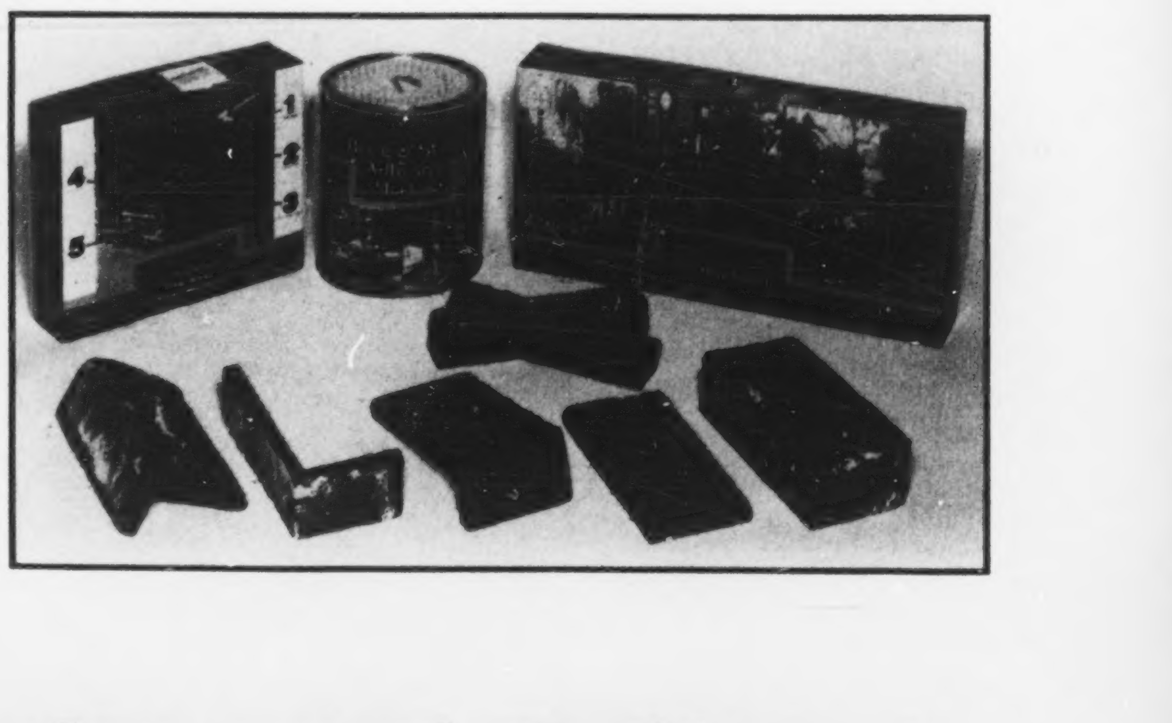

With K-Lux Decorative Brick's five accessories, you can create fireplaces, arches and recesses with a professional look.

*Products installed as taken from their cartons.

K-Lux
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DIY PRODUCT ANALYSIS

Decor: Floor/ceiling

Product	Bought	Will buy	Did install self	Will install self
Carpet	27.0%	9.0%	20%	24%
Linoleum	11.7	4.7	25	34
Floor tile	7.9	2.3	35	63
Ceiling tile	4.6	2.2	45	72
Stucco	3.9	1.0	19	25
Wood floor	3.7	0.7	20	33

Source: NHCN/NAHB research

Carpeting ranks 5th among DIY purchases

In the past 12 months 27% of the respondents to the *NHCN*-NAHB survey bought carpeting, ranking it the fifth most popular home improvement product.

Translated into real terms, it means that 12 million owners of single-family, detached houses bought carpeting last year. Significantly, for home improvment product buying plans over the next 12 months, carpet ranks fourth.

Other floor covering alternatives, like linoleum, wood and tile are substantially less popular. Linoleum is the next most often chosen alternative of those surveyed. And 11.7% of respondents bought it during the past 12 months.

Of those who purchased linoleum, 25% installed it themselves, which makes it more of a DIY product than carpet and wood flooring. Tile was most often installed by homeowners; 35.4% of those surveyed tackeled that job.

Installing a ceiling, in contrast, is seen as more DIY-oriented. Of the 4.6% of respondents who bought ceiling tile in the past 12 months, 44.7% installed it themselves.

The tile was strongest in older homes, a logical finding as the product is designed to camoflage major imperfections. In houses built before 1950 9.2% of the respondents bought ceiling tile. In comparison only 1.8% of the respondents living in homes built since 1970 bought tile.

There also seems to be a greater inclination to buy the product among lower-income homeowners, with 6.7% of those earning below $14,999 having purchased it.

Interest is building

A similar lower-income trend was also evident among purchasers of linoleum. However, with that product there was also interest shown among higher-income homeowners.

Of respondents earning below $14,999, 15.3% bought linoleum, while 18.6% of those earning between $35,000 and $49,000 also bought it. These opposite trends obviously suggest a broad market with a wide variety in potential price points and product quality.

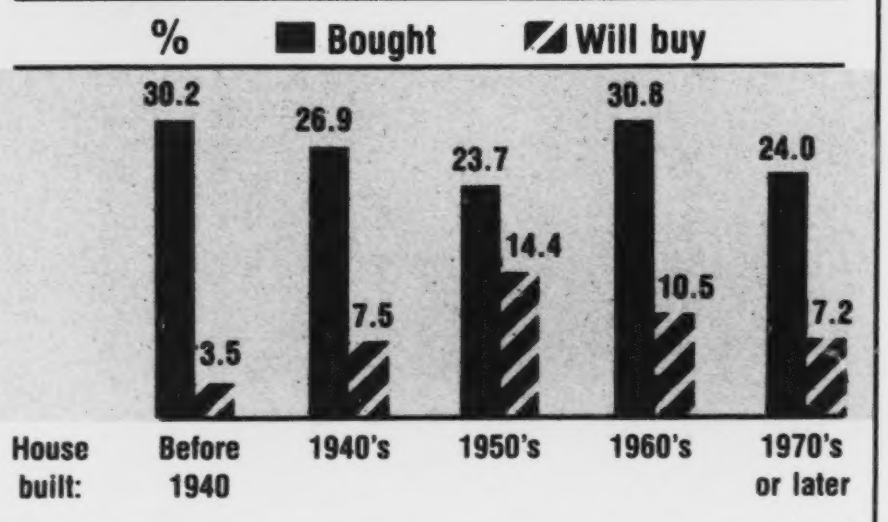
Linoleum was bought more often by owners of homes built before 1960, with 14% of those owning pre-1940 homes having bought linoleum. The same figure for the 1940's is 17.2%; for the 1950's, 10.7%.

Carpet proved strong in all decades and with all income groups. The same consistency was shown when respondents were divided by age, although the 35-54 year olds seem somewhat more likely to buy carpet, as 33% of them had purchased it during the past year.

Both linoleum and carpet remained popular with new as well as veteran home owners.

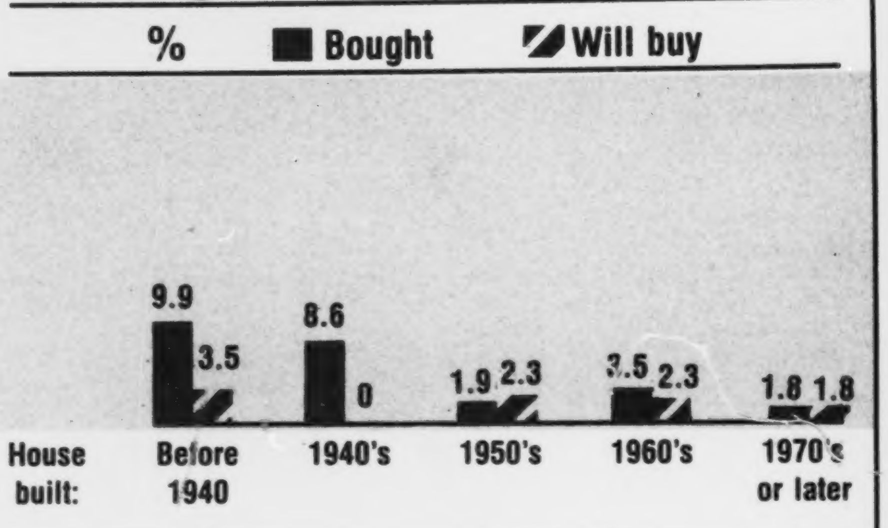
DIY PRODUCT ANALYSIS

Carpet



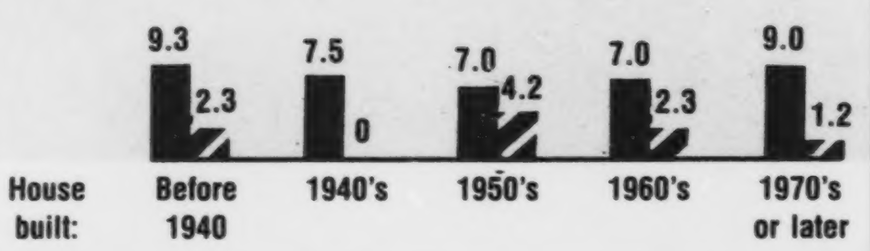
DIY PRODUCT ANALYSIS

Ceiling Tile



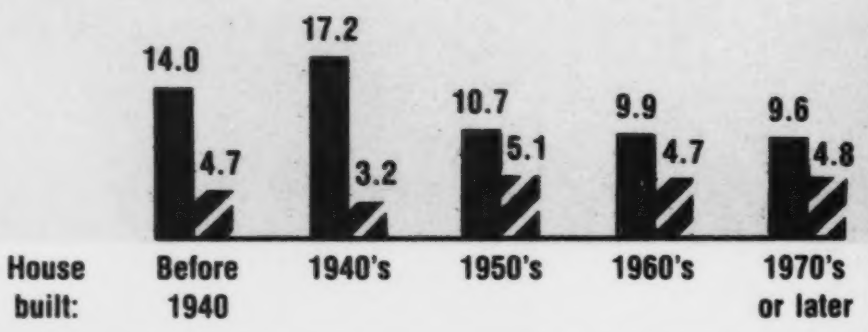
DIY PRODUCT ANALYSIS

Floor tile



DIY PRODUCT ANALYSIS

Linoleum



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DIY activity: A special report

DIY PRODUCT ANALYSIS

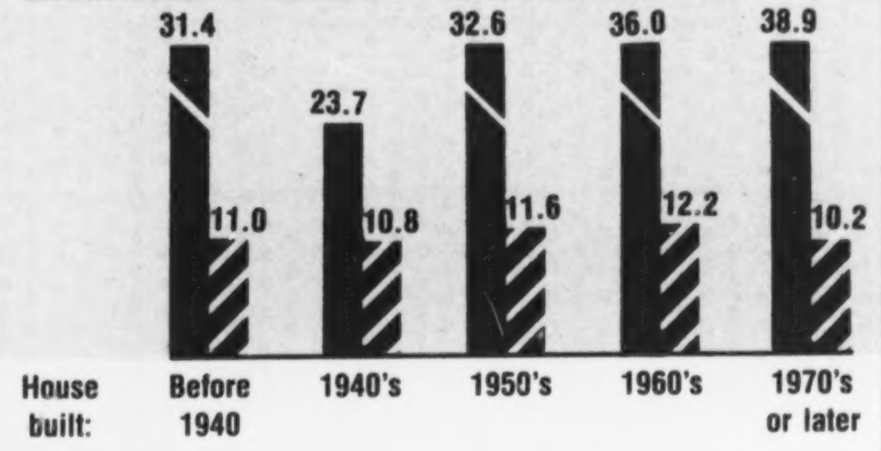
Tools/accessories

Product	Bought	Will buy	Did install self	Will install self
Fasteners	33.3%	11.2%	—	—
Brushes, rollers	27.1	8.5	—	—
Hand tools	26.0	6.6	—	—
Power tools	22.5	4.3	—	—
Ladders	13.8	3.7	—	—
Stationary tools	8.1	1.6	—	—

Source: NHCN/NAHB research

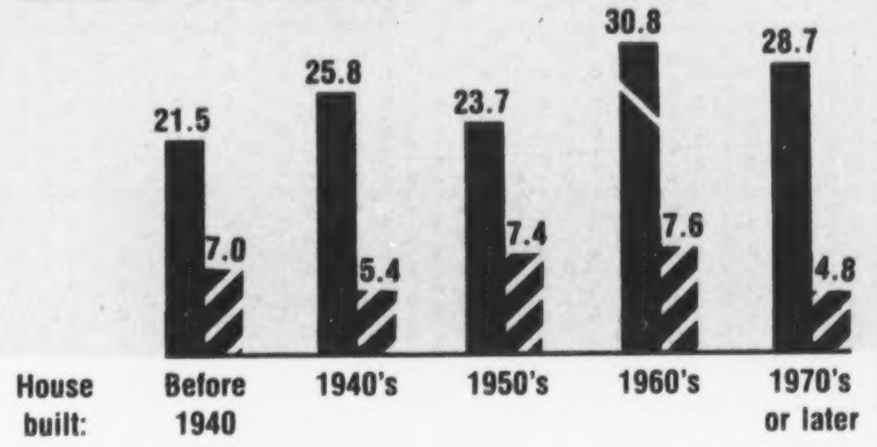
DIY PRODUCT ANALYSIS

Fasteners



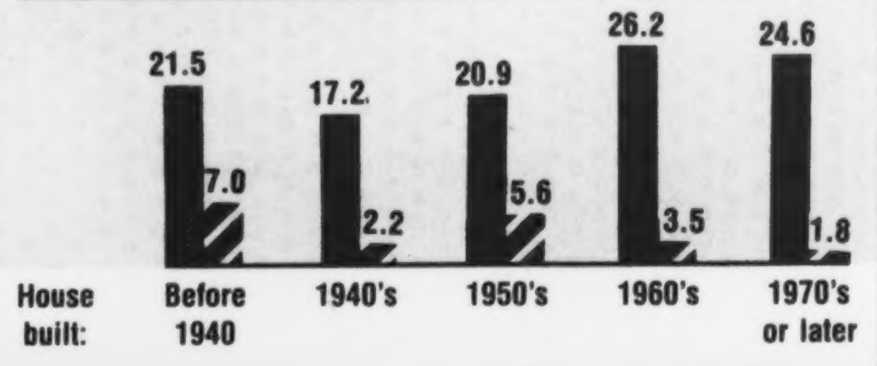
DIY PRODUCT ANALYSIS

Hand tools



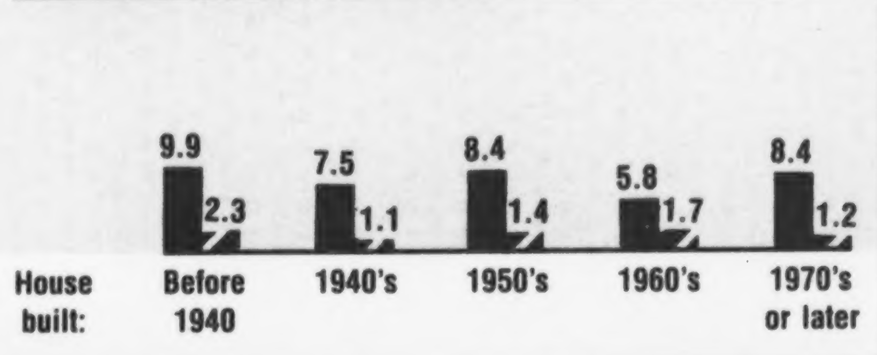
DIY PRODUCT ANALYSIS

Power tools



DIY PRODUCT ANALYSIS

Stationary tools



Most fasteners bought on spur of the moment

NATIONAL REPORT—One third of all single-family, detached, owner-occupied households in the United States purchased fasteners in 1981, and another 26% bought a hand tool.

In addition, sales of these products are projected to maintain their momentum over the next 12 months, based on data compiled in a nationwide survey conducted by *NHCN* and the National Assn. of Home Builders.

Nails, screws, nuts, bolts and other fasteners were purchased by 14.8 million households over the last year, with another 4.97 million homes expected to buy the product in the next 12 months. (Future purchases are lower because few homeowners actually plan to buy fasteners and do so only when needed.)

Interestingly, the highest response rate came from owners of homes built after 1970—38.9% bought fasteners last year. Of those respondents that will buy fasteners over the next 12 months, 12.2% live in homes constructed between 1960 and 1969, comprising the largest response.

The 30-34 year old age group appears to be the one looking to purchase fasteners with the most frequency: within that group, 50% of the respondents had bought fasteners during the previous 12 months, and another 23.6% said they would be buying the products over the course of the next year.

Hand tools meanwhile were purchased by 11.5 million households during the past 12 months, and 6.6% of the respondents insisted they would buy a hand tool sometime next year, which equates into a 2.93 million-home market.

Again, a lot of sales activity seems to be coming from the 30-34-year-old age classification, with 36.1% of that group having bought the product in 1981, and a surprising 16.7% (over six percentage points higher than any other age group) indicating they would make a hand tool purchase over the next 12 months.

Defining the market by home type, the largest response came from those owning homes built in the 1960's, of which 30.8% bought a hand tool last year, and another 7.6% will purchase one over the next 12 months. By income type, those respondents with household incomes of $25,000-$49,999 gave the highest "will buy" response.

Almost 10 million owner-occupied, single-family households bought hand-held power tools during the last 12 months, or about 22.5%. However, with only 4.3% of all respondents planning purchases (again reflecting conservative buying plans among those not facing immediate needs), the market appears to be softening.

Some of the more intriguing market statistics occurred in the category of ladders. These products are being purchased and will be bought in the future, according to the survey, by owners of older homes, with 18.3% of those living in 1940's homes having bought a ladder last year, and 5.2% of those in pre-1940 houses saying they will buy the item over the next

(Continued on page 42)

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DIY activity: A special report

Consumers view painting as the top interior project

In the eyes of consumers, painting a room was seen as the most important interior DIY project completed over the last 12 months. A total of 3.4% of the respondents to *NHCN*/NAHB's consumer survey did the job themselves, while 1.9% relied on a contractor for all or part of the work.

This translates to 1,509,600 DIY room painting projects plus an additional 843,600 contractor or contractor-assisted projects. With 39.3% of the respondents having bought some kind of paint during the past year, the survey revealed that less than one-tenth actually used it to paint an entire room.

Redecorating the kitchen was second on the DIY list, cited by 2.7% of the respondents or 1,198,800 households; installing insulation tied for the No. 2 spot with 2.7%.

Although adding a room, covering floors and changing plumbing were among the most important DIY projects homeowners said they completed, more respondents had some contractor assistance on these jobs than actually did all the work themselves.

More winners

Reflecting the boost in ceiling fan sales, 0.8% of the respondents, or 355,200 single-family households, cited installation of fans as the eighth most important DIY project.

Topping the list of the 10 most important DIY interior projects planned for the coming year was installing insulation, cited by 1.4% of the respondents. An additional 0.5% planned to have at least some contractor help.

Redecorating the kitchen and remodeling the bath tied for second place on the list at 1.3%, translating to 577,200 households.

Floor covering, in sixth spot, was primarily a contractor-assisted project, with 1.4% of respondents so indicating, and 1.1% doing it all themselves.

In 10th spot on the list was installing a fireplace or insert, reflecting a continuing concern for making the home energy efficient, with 0.4%, or 177,600 households, indicating that installing a fireplace or insert was a mandatory addition to their DIY list.

HOMEOWNER PROFILE

10 most important projects planned—Interior

Project	Households that plan to do (in thousands) Themselves	Contractor*
1. Install Insulation	622	222
2. Redecorate Kitchen	577	310
3. Remodel Bath	577	222
4. Paint Room	533	266
5. Finish Basement	533	—
6. Cover Floor	488	622
7. Add a Room	355	311
8. Wallpaper	355	178
9. Remodel Den/etc.	222	444
10. Fireplace/insert	178	888

*all or part of work

Source: NHCN/NAHB research

HOMEOWNER PROFILE

10 most important projects completed—Interior

Project	Number of households (in thousands) DIY	Contractor*
1. Paint room	1,510	844
2. Redecorate kitchen	1,199	888
3. Install insulation	1,199	710
4. Wallpaper	1,110	488
5. Remodel bathroom	799	222
6. Add room	533	666
7. Cover floors	488	888
8. Add fans	355	—
9. Finish basement	311	—
10. Change plumbing	266	488

*Did all or part of work

Source: NHCN/NAHB research

PAINT
House Paint

Painting the house was seen as the most important interior DIY project completed in the last 12 months.

NHCN photo

DIY PRODUCT ANALYSIS

Decorative accessories

Source: NHCN/NAHB research

Product	Bought	Will buy	Did install self	Will install self
Drapes	20.9%	8.3%	40%	51%
Curtains	17.7	5.6	51	65
Finished furniture	17.7	4.9	—	—
Shades	15.3	4.8	44	68
Towel rack/soap dish	13.6	3.1	44	56
Drapery hardware	12.9	3.8	48	65
Wood shelving	11.8	4.6	57	82
Cabinet hardware	11.1	3.1	44	56
Built-in shelving	6.7	1.5	47	42
Shutters	6.2	1.6	51	85
Unfinished furniture	4.0	1.1	—	—
Greenhouse	2.3	0.6	68	20

Market for drapes strong in new homes

Drapes were the No. 15 best-selling home center product last year according to the *NHCN*-NAHB survey, and responses indicate that increasing popularity will make it the sixth best seller over the next 12 months.

The market for drapes is strong: 20.9% of the households queried purchased drapes last year. Owners of homes built after 1970, however, indicated a far higher percentage of planned purchases, with 12.6% of those homeowners indicating they will buy drapery in the coming year compared to an 8.3% average among owners of homes from other decades.

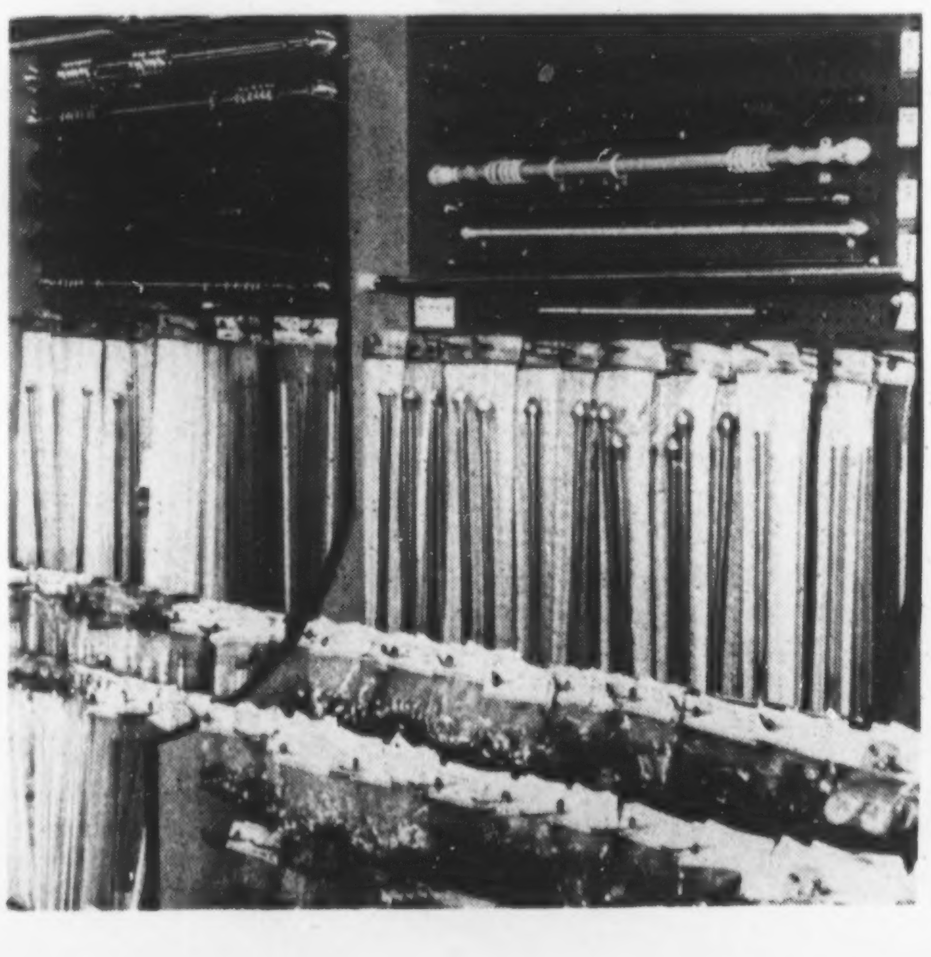
Wood shelves were bought more often by people 30-34 years old than other age groups; 15.3% of the respondents in that group bought shelves in the past year compared to an average 12.2% for other age categories.

Cabinet hardware may have been sold more for repair than initial installations in last year's troubled economy, since sales were heaviest in older homes. 15.1% of the respondents who owned 1940's homes and 14% of those living in prewar homes bought cabinet hardware while the average among homes of all ages was 11.1%.

Owners of 1970's homes plan to buy more shutters than any other group of homeowners; 4.8% of those respondents indicated they will buy shutters in the next 12 months compared to an average 1.6% of all respondents.

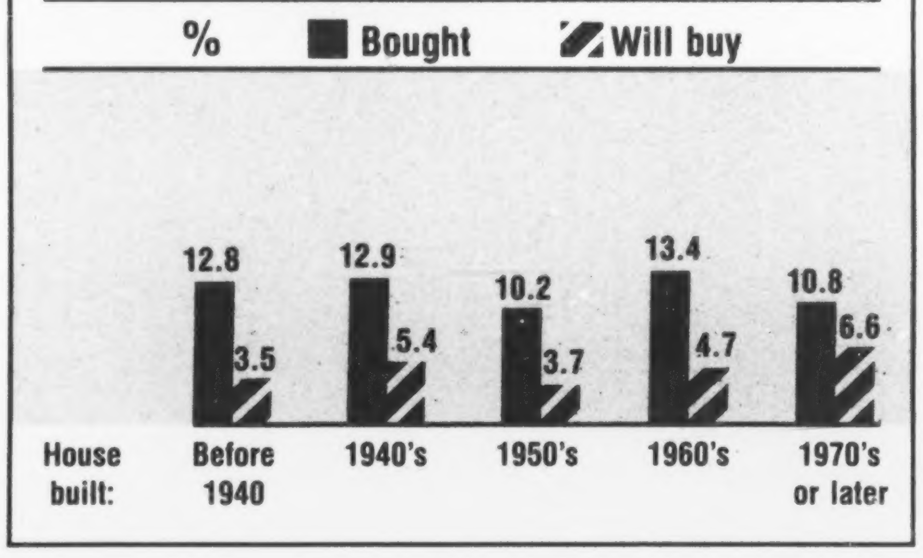
Shutters were a popular DIY product last year, particularly with people living in homes built in the 1940's, 1950's and 1960's. The per cents of respondents in those groups who put up shutters themselves were 71.4%, 61.5% and 72.7% respectively, and DIY installation averaged a high 51%.

Towel racks and soap dishes sold very strongly to owners of homes built in the 1940's; 20.4% of those respondents bought the products in the past 12 months compared to 13.6% on average.



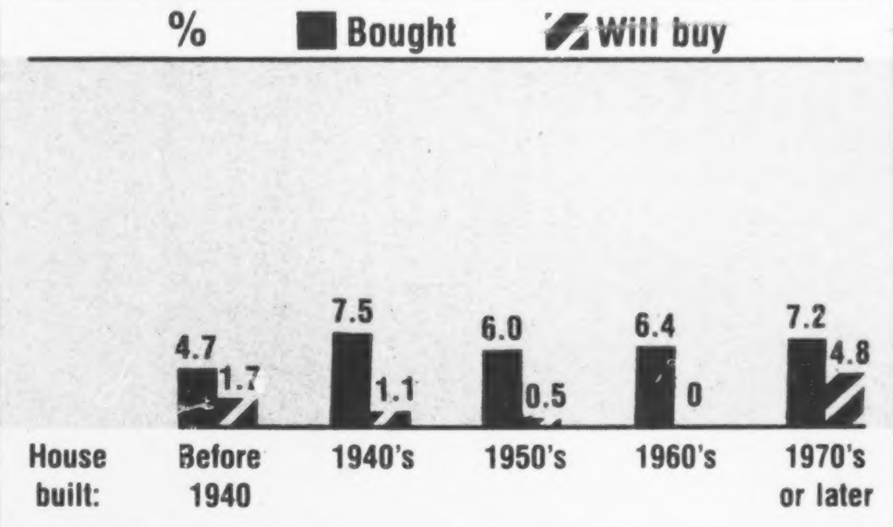
DIY PRODUCT ANALYSIS

Wood shelving



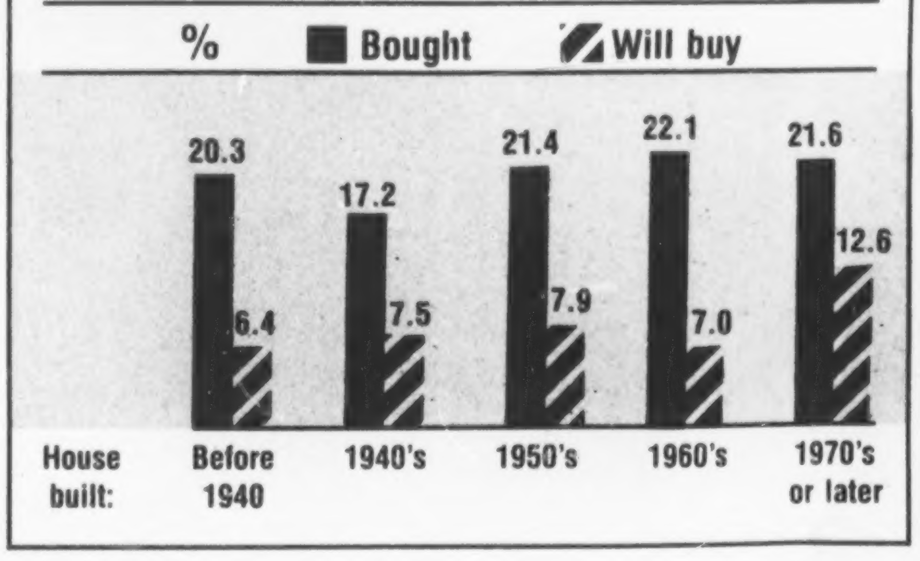
DIY PRODUCT ANALYSIS

Shutters



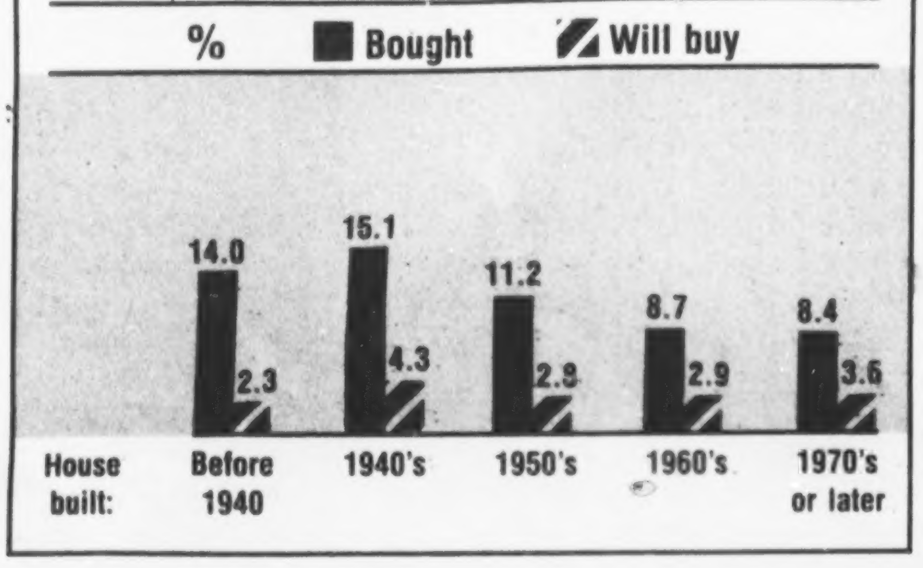
DIY PRODUCT ANALYSIS

Drapes



DIY PRODUCT ANALYSIS

Cabinet hardware



DIY activity: A special report

DIY PRODUCT ANALYSIS

Lawn & garden

Product	Bought	Will buy	Did install self	Will install self
Seed/fertilizer	44.2%	19.9%	44%	49%
Garden hose	22.3	7.1	—	—
Tools/equipment	19.9	6.7	—	—
Patio furniture	12.2	5.0	—	—
Mail boxes	11.0	2.0	49	69
Storage sheds	6.8	3.7	57	70
Sprinkler systems	4.5	1.1	22	56
Fencing:				
Wood	8.1	4.5	52	60
Chain link	5.5	1.2	20	80
Wire	4.3	1.1	46	56
Brick	0.9	0.2	29	100
Stone	0.4	0.1	100	100

Source: NHCN/NAHB research

Demand for patio furniture grows

Upkeep of the lawn and garden is an essential element of owning a home, respondents in the *NHCN*/NAHB nationwide consumer survey indicated.

Basic lawn and garden products, including seed, fertilizer, garden hose and tools, were the most heavily demanded by the homeowners, the study said. However an accent item, patio furniture, revealed the most interesting statistics in the category.

Owners of homes built in the 1950's, 1960's and 1970's were most prone to have purchased patio furniture; 10.2% of the respondents who owned homes built in the 1970's were looking to make future patio furniture purchases this year, the survey indicated. That figure was well above the 5% average who said they planned such buys in the next 12 months.

Regionally, demand for the furniture has been particularly high in the Atlantic, Southeast and Mountain states, while future demand is concentrated in the East North Central, Mountain and Pacific regions where the percentage of respondents who said they would buy in the future was 7.2%, 6.2% and 8.5%, respectively.

Not surprisingly, patio furniture purchases were favored by households with incomes in the $20,000-$25,000 and $35,000-$50,000 income range.

Seed and fertilizer head both the list of basic lawn care goods bought by consumers and the list of all home center products sold last year, the survey showed.

Purchases were made by 34.9% of the respondents who own homes built before 1940, compared to the high of 52.1% for homes built after 1970. Owners of 1940's and post-1970 homes are the most likely to buy seed and fertilizer over the next 12 months.

As income increases, higher percentages of respondents said they have purchased or will buy seed and fertilizer with the greatest inclinations to apply the goods themselves in the $15,000-$70,000 income brackets.

The purchase of garden hose was common to 22.3% of all respondents and 7.1% of them said they intend to make a garden hose purchase.

Past and future demand for garden hose was constant in each home group and each area of the country, except in the East South Central and Mountain sections where intent to purchase was expressed by 11.8% and 12.3% of the respondents, respectively.

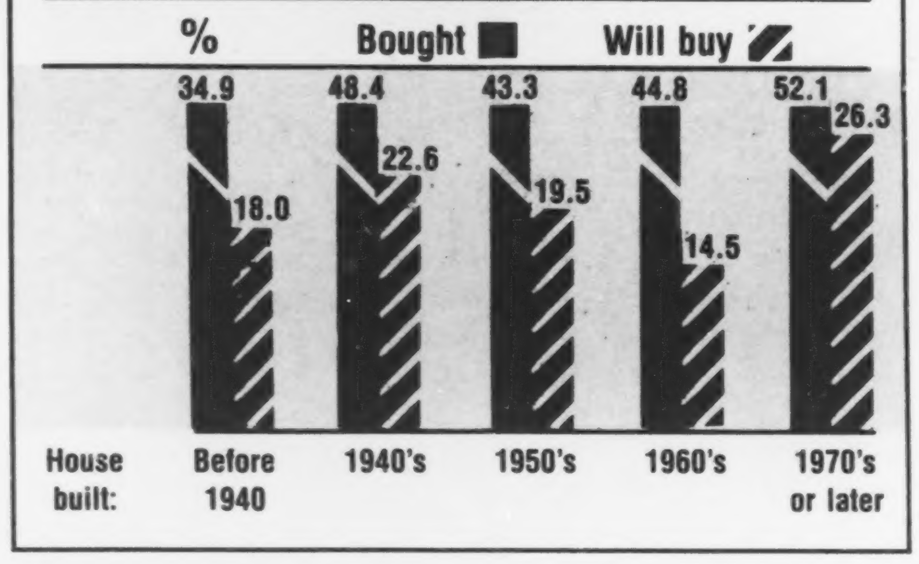
Tools and equipment for lawn and garden also showed relatively strong preferences by respondents in all categories regarding both past and future buys.

The survey showed that storage sheds are a popular item,

(Continued on page 42)

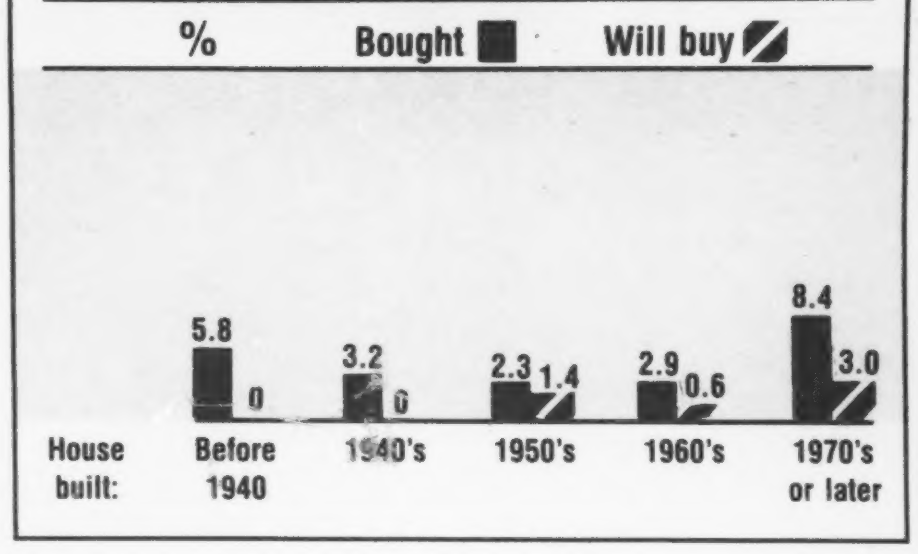
DIY PRODUCT ANALYSIS

Seeds & Fertilizers



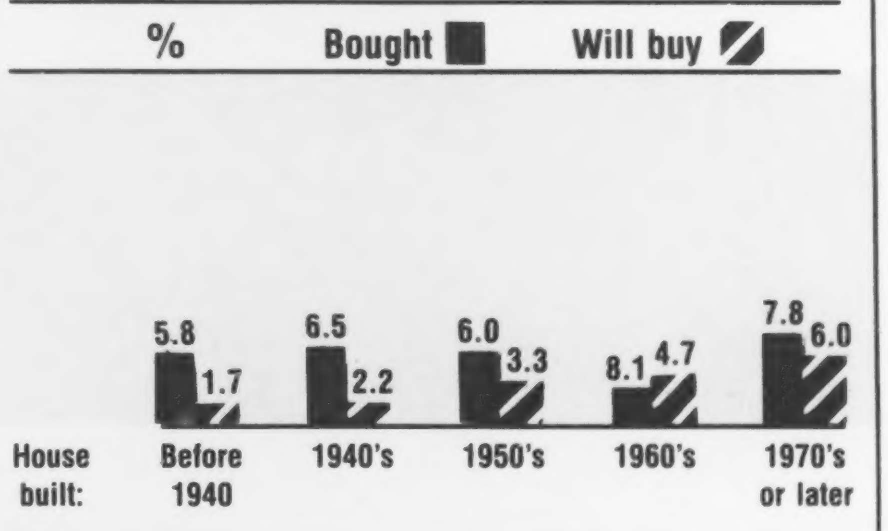
DIY PRODUCT ANALYSIS

Sprinkler system



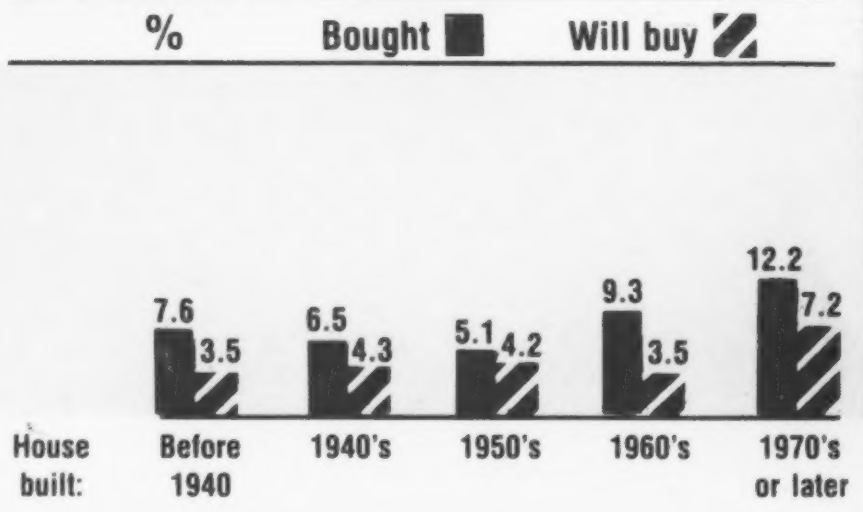
DIY PRODUCT ANALYSIS

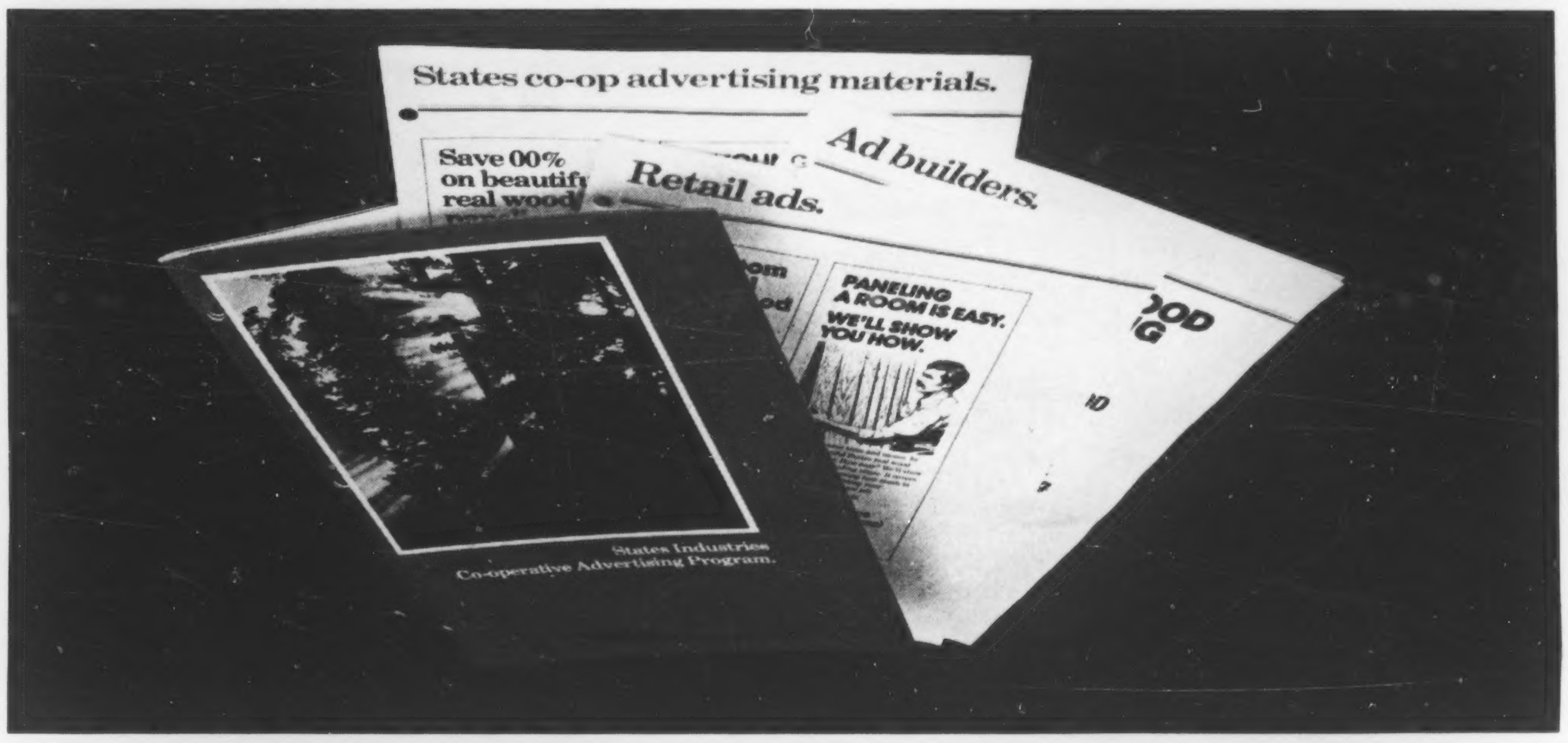
Storage sheds



DIY PRODUCT ANALYSIS

Fencing—Wood

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Frost Hardwoods—San Diego
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COLORADO
Boise Cascade Corporation—Denver, Grand Junction
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GEORGIA
Sequoia Supply—Atlanta
IDAHO
Boise Cascade Corporation—Boise
C.A. Company—Lewiston
ILLINOIS
Edward Hines Lumber Co.—South Chicago Heights
Illinois River Lumber Company—E. Peoria
Springfield Builders Supply—Springfield
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Edward Hines Limber Co.—Council Bluffs
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The Wood Products Co.—Waterloo
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Dixie Plywood—Landover
Sequoia Supply—Columbia
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Edward Hines—Grand Rapids
MINNESOTA
Shelter Products—New Ulm
Edward Hines Lumber Co.—Farmington
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Sequoia Supply Inc.—Jackson
Triangle Distributors, Inc.—Tupelo
United Plywoods Corp.—Meridian
MISSOURI
Edward Hines Lumber Co.—Springfield
Four States Supply—Carthage
Lumberyard Supply—St. Louis
Toombs & Company—Springfield
MONTANA
Boise Cascade Corp.—Billings
NEBRASKA
Central Lumber Sales—Lincoln
Rounds & Porter Co.—Hastings
NEVADA
Capitol Plywood—Reno
NEW MEXICO
Thunderbird Steel Corp.—Albuquerque
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Apex Building Products—Binghamton
Superior Supply and Hardware—Rotterdam
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DIY PRODUCT ANALYSIS

Outdoor power

Product	Bought	Will buy	Did install self	Will install self
Lawn mowers	22.6%	5.5%	—	—
Trimmer/edgers	14.5	2.0	—	—
Chain saws	7.8	1.0	—	—
Snow blowers	5.9	1.2	—	—
Generators	1.1	0.1	11%	—

Source: NHCN/NAHB research

Lawn mowers still lead outdoor power group

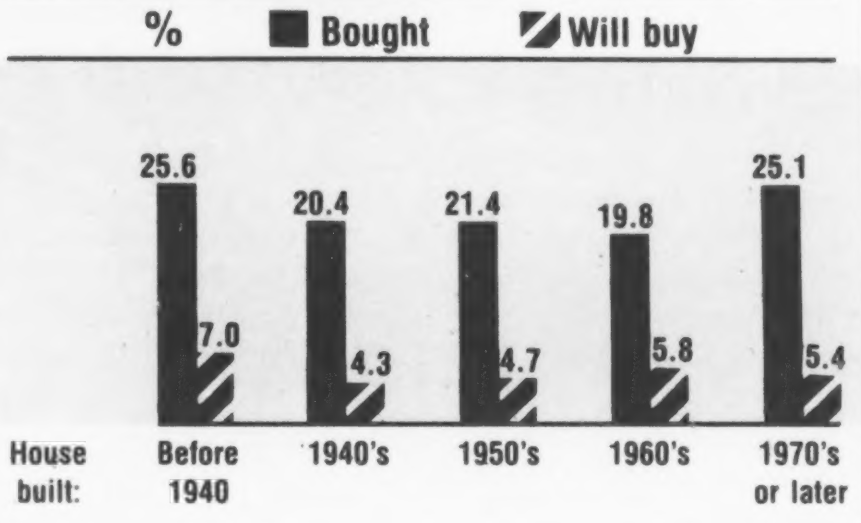
Lawn mowers are still the No. 1 product homeowners purchase in the outdoor power equipment category, *NHCN*/NAHB's nationwide consumer research study revealed.

Owners of homes built in the 1970's, and in homes built before 1940 showed the highest purchase rate for lawn mowers in the past 12 months, with a little over one quarter of the homes in each age group making purchases, compared to approximately one-fifth of the homes in the other three age groups.

Among those who plan mower purchases in the next 12 months, the primary market appears to be homeowners living in pre-1940 homes where 7% planned to buy a lawn mower, compared to the 5.5% overall average. Homes built in the 1960's followed by those built in the 1970's will be the next most likely homes for new lawn mowers.

DIY PRODUCT ANALYSIS

Lawn mowers



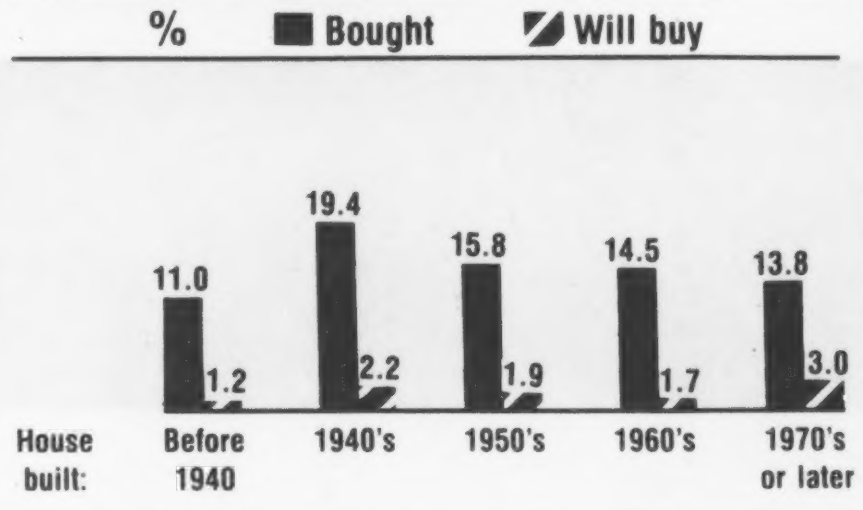
Significantly, 13.5% of the homeowners in the West South Central states plan mower purchases in the next year, well above any other region, and the national average.

In the snow blower category, 5.9% of the respondents overall said they purchased the product in the past 12 months. Age of the home seemed to have less to do with purchases than regional differences. Future demand, however, seems concentrated among homeowners living in homes built in the 1970's, and before 1940, where 2.4% and 2.3% respectively plan to buy a snowblower in the coming year, compared to the 1.2% overall average. This concentration is perhaps due to the higher percentage of affluent professionals living in those homes. Not surprisingly, the North Central states account for most of the purchasing activity.

Meanwhile, trimmers/edgers and chain saws showed strong popularity: 14.5% of the survey's respondents bought trimmers and 7.8% bought chain saws in the past 12 months.

DIY PRODUCT ANALYSIS

Trimmer/edgers



The highest concentration of trimmer purchases were made by owners of homes built in the 1940's—corresponding in part to the higher incidence of retired residents—where 19.4% purchased the product. Owners of homes built in the 1970's, however, appear to be the brightest market in the next 12 months, where 3% plan purchases compared to 2% nationally.

The age of the home seemed to have little influence on chain saw purchases. The mid-Atlantic and West South Central regions seemed to be the primary areas of purchasing activity, the study showed, with approximately one quarter of the region's respondents purchasing the product. About 1% of all respondents plan to buy a chain saw in the next 12 months. The relatively low figure reflects in part the tendency by respondents to plan conservatively when projecting higher-ticket purchases.

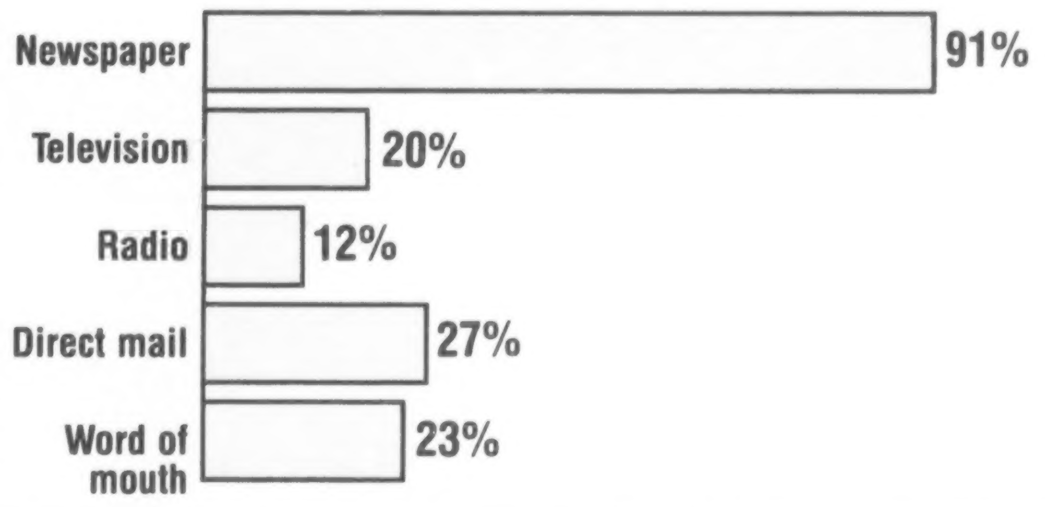
Newspapers are most influential ad medium

Advertising affects the buying decisions of about three-quarters of the nation's single-family homeowners, according to the *NHCN*/NAHB survey.

The overwhelming influence of this group is newspaper advertising. Nine out of 10 respondents who said advertising was a factor in their buying decisions pointed to the power of print.

HOMEOWNER PROFILE

What type of advertising affects shopping decisions for home improvement products



At the same time, direct mail had a strong affect on high-income owners of new homes.

Overall, direct mail was second in influence. Of respondents who said they reacted to advertising, 91% reported newspapers as influential, followed by direct mail, 27%; word of mouth, 23%; TV, 20% and radio, 12%.

TV proved surprisingly weak in reaching the usual target homeowner audience of 35 to 44 year olds.

It primarily influences households with combined incomes of $25,000-$35,000 or less than $15,000. People under 35 and over 65 are most affected.

Regionally the impact of TV is strongest in the East Central area, both north and south, where 24.6% and 25.5%, respectively, said they were influenced by commercials.

Least affected regions are the West North Central and the Pacific, where the figures are 16.3% and 12.9% respectively.

The impact of direct mail was strongest in the North Central region, east and west.

At the same time, younger people are much more likely to respond to direct mail with 42.4% of the 25-29 age group and 34.5% of the 30-34 group indicating they react to mail advertising.

Radio advertising also seems to have its greatest influence among younger home owners, with only 7.1% of respondents in the 35-44 year old category saying they are influenced by radio ads compared with 24.2% of the 25-29 group.

Word of mouth, although not a generally accepted form of advertising, was included as an option in the survey and cited by 23.3% of the sample as influential. Its impact was fairly equal across all income levels, ranging from 18.9% among the $50,000-$70,000 group to 28.4% among the $20,000-$25,000 sample.

Patio furniture a favorite

(Continued from page 39)

especially in homes built in the 1960's and 1970's, reflecting a general decline in storage space in increasingly newer homes. Above-average responses came from homeowners in these categories.

Of the owners of 1960's homes, 8.1% said they have purchased and 4.7% said they will purchase a storage shed. For the owners of 1970's homes, 7.8% said they have bought and 6% said they will buy a shed.

Storage sheds received the highest responses in the have-purchased and will-purchase categories primarily in the South.

In fencing, the most significant trends were seen with the wood variety, the survey indicated.

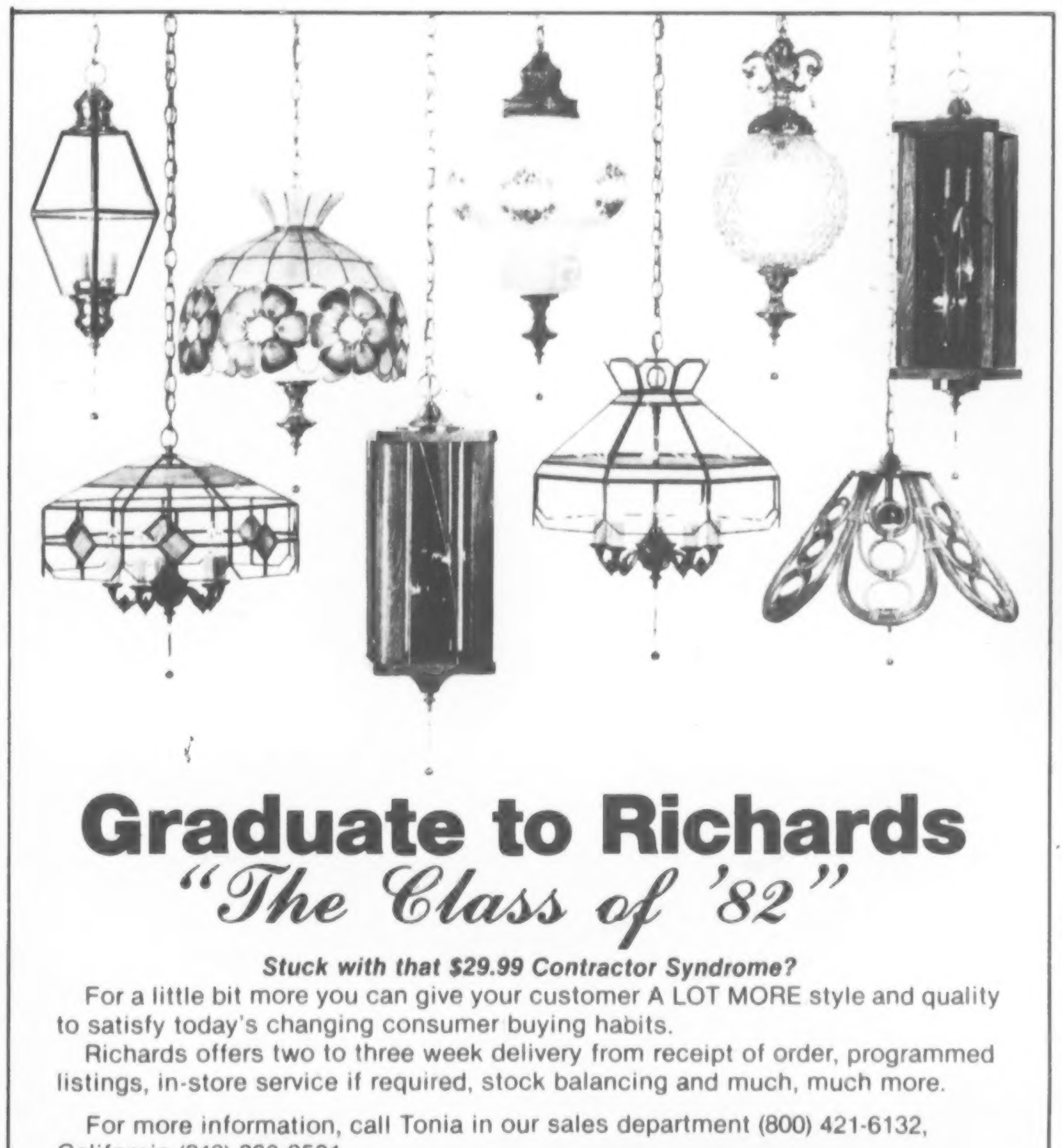
For owners of homes built in the 1960's and 1970's, 9.3% and 12%, respectively, said they bought wood fencing compared to an 8.1% average overall. Another 7.2% of the owners of homes built in the 1970's showed a strong desire to buy wood fencing in the coming year, well above the 4.5% average, the study showed.

Fasteners, tools

(Continued from page 35)

12 months. Each percentage represented the highest response rate in its group. Overall, 13.8% bought ladders in last year; 3.7% expect to.

One area where tool sales are not expected to improve is in stationary power equipment, primarily because of the advent of sophisticated bench tools. While an estimated 3.6 million households bought a stationary tool in 1981, only 710,400 are projected to make a similar purchase over the next 12 months. Once again this, in part, reflects the tendency not to plan major purchases until faced with the need. It also reflects the reluctance to make bigger-ticket purchases.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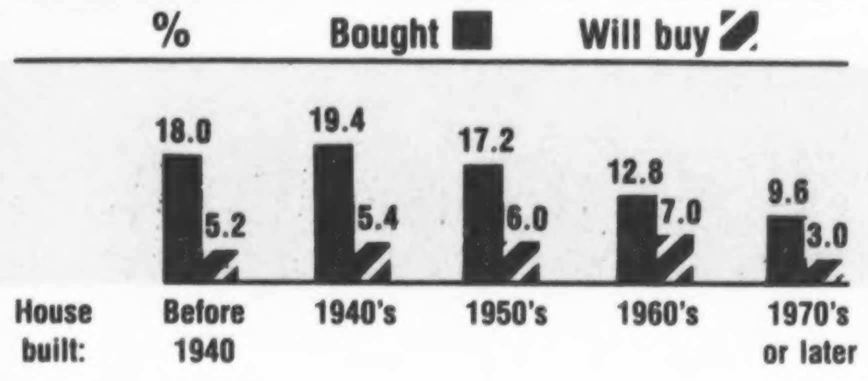
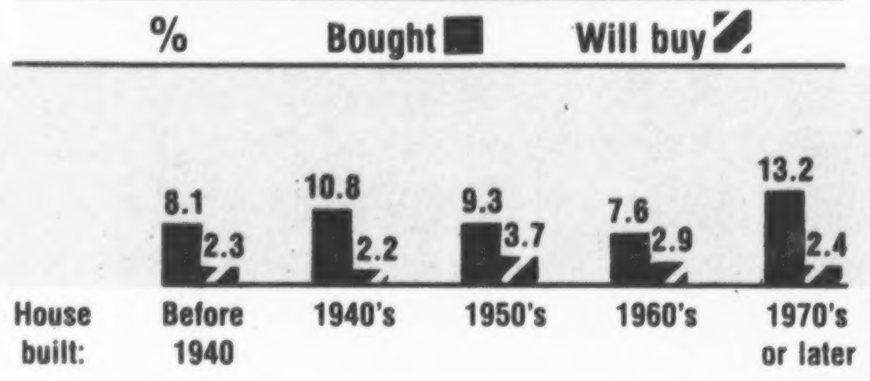
DIY PRODUCT ANALYSIS

Roofing



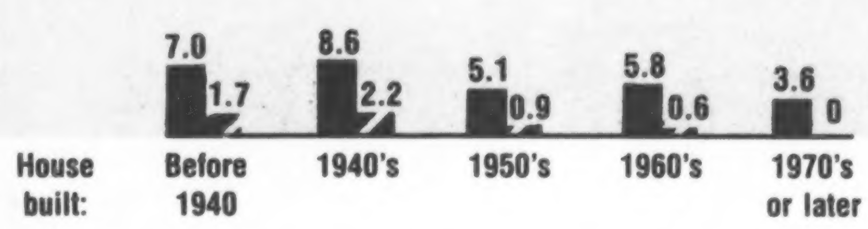
DIY PRODUCT ANALYSIS

Garage door opener



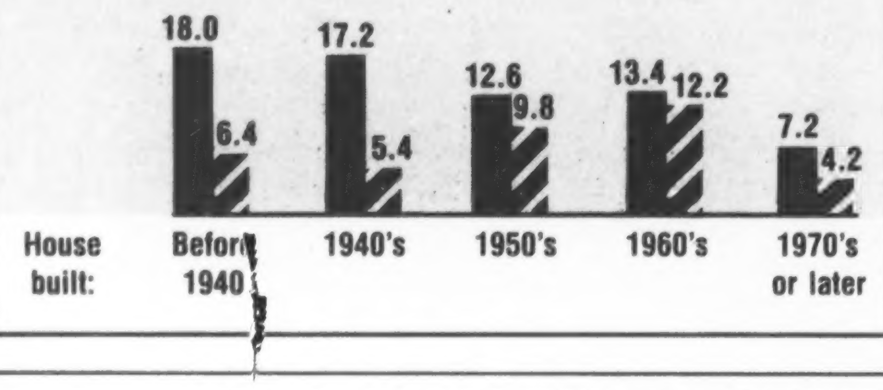
DIY PRODUCT ANALYSIS

Siding



DIY PRODUCT ANALYSIS

Gutters & Downspouts



DIY PRODUCT ANALYSIS

Exterior

Source: NHCN/NAHB research

Product	Bought	Will buy	Did install self	Will install self
Roofing	15.1%	5.4%	21%	36%
Gutters/downspouts	13.3	7.9	31	42
Barbecue grill	11.2	2.7	—	—
Garage door opener	9.6	2.8	38	39
Attic ventilators	8.5	3.3	29	37
Driveway sealer	8.2	4.9	48	45
Siding	5.7	1.0	23	13
Wood deck	4.4	2.8	47	74
Patio:				
Poured concrete	8.8	2.0	26	44
Brick	2.3	1.1	47	56
Slab	2.0	0.5	25	50
Stone	1.0	0.6	38	40
Barbecue pit:				
Brick	1.1	0.7	44	67
Stone	0.2	0.5	—	50

Roofing tops exterior category

The most frequently purchased exterior product is roofing, according to the 1982 *NHCN*-NAHB survey of homeowners.

Changing a roof was ranked No. 1 in a list of additions and alterations homeowners plan to undertake during the next 12 months.

When considering additions and alternations planned over the next 24 months, homeowners viewed roofing with somewhat less priority, placing it third after basement and kitchen remodeling.

This slight drop in priority, when viewed in a longer time frame, may have to do with the urgency homeowners place on roofing.

In the overall list of DIY projects, changing a roof ranks fourth, with an average of $710 spent. Other top-ranked exterior DIY projects are enclosing an existing den/patio/porch, adding a patio and adding a deck.

Generally, owners of older homes are more likely to have bought roofing products, the survey shows. However, the category is strong regardless of a home's age.

For respondents who own houses built before 1940, 18% have purchased roofing products. For those living in homes built in the 1940's, the figure is 19.4%; in the 1950's, 17.2%. For those living in newer homes built in the 1960's and 70's, the figure drops to 12.8% and 9.6% respectively.

Not surprisingly the strongest roofing markets are in the East and Central regions, where the nation's oldest housing stock is located.

Among respondents who said they had purchased material for patios, poured concrete is a strong favorite compared with brick, stone or slab.

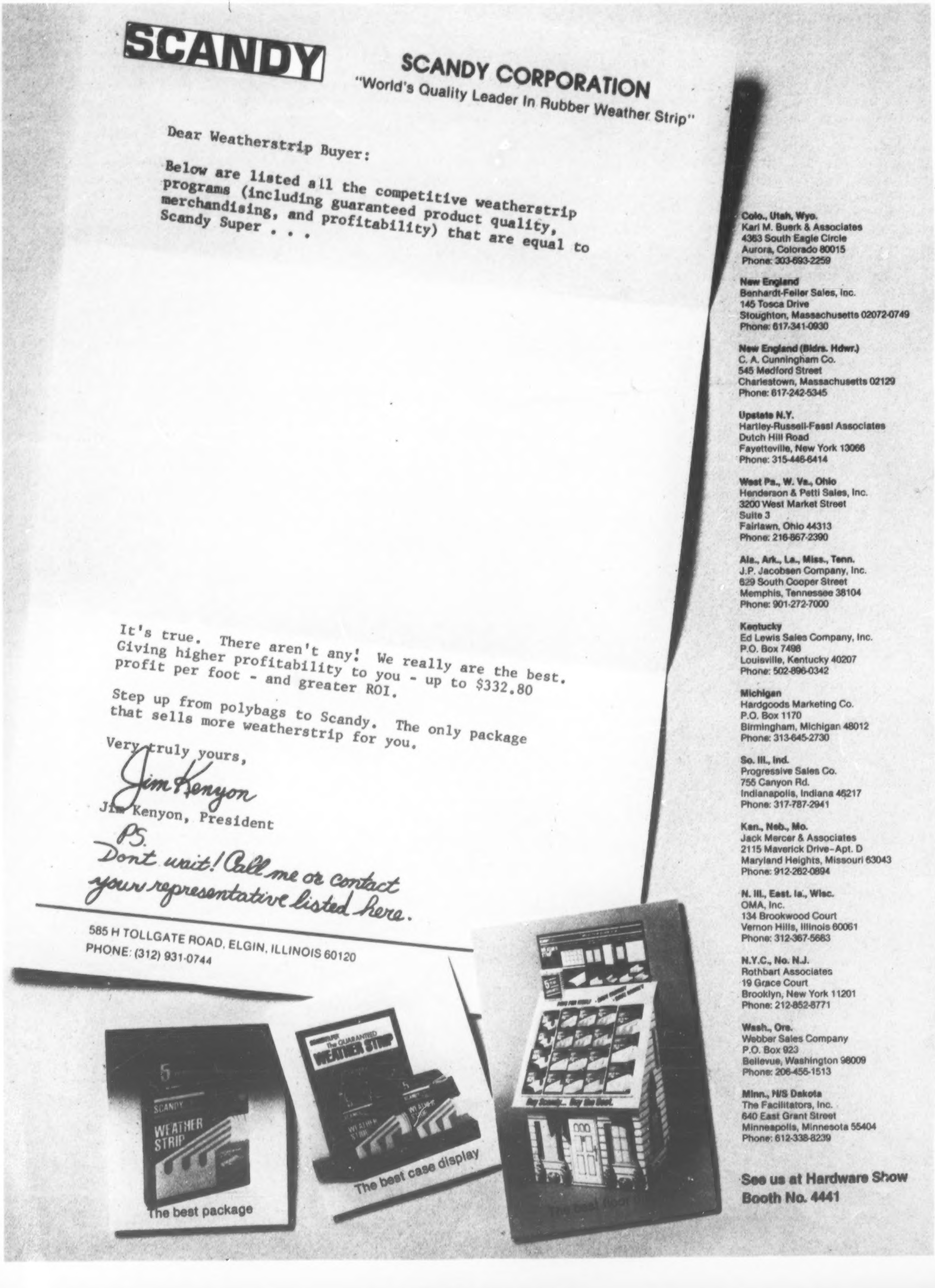
Poured concrete is fairly even in popularity regardless of a home's age, although, interestingly, it is most popular with homeowners in both the oldest and newest structures.

For those living in pre-1940 homes, 9.3% bought material for poured concrete patios, while 11.4% of those in homes built since 1970 made similar purchases.

Brick patios are most popular with the owners of homes built in the 1940's. Of those, 4.3% bought brick in the past 12 months. The second most popular building-era for brick was the 1960's; 4.1% of those homeowners bought brick.

Stone is much less popular in patio construction, peaking in

(Continued on page 47)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Giving homes a new coat is still the top project

Homeowners rank painting the outside of their homes the most important exterior project completed last year.

Painting was ranked significantly higher than the exterior project seen as second in importance, installing storm windows and doors.

Painting was also a strong DIY rather than contractor project.

These findings were part of the *NHCN*/NAHB survey of homeowners living in single-family, detached, owner-occupied dwellings (44.4 million units in the United States). There were 900 survey respondents.

Of those, 3.6%, which can be projected to 1.6 million households, saw house painting as the most important project completed. They also did it themselves. Another 0.9% of respondents, or 400,000 households, painted the outside of their homes with contractor help.

Storm window and door installation was seen as the most important exterior project completed by 1.9% of the respondents who did the work themselves and another 1.3% who had contractor help.

Putting on a new roof was considered third in importance, but of those who completed that project more relied on outside assistance than did it themselves.

In total, 6.7 million households bought roofing last year, 17.4 million purchased interior and exterior paint and 10.5 million spent money on storm windows and doors.

Over the next 12 months, exterior painting will again be the most important DIY project among those polled, with 2.2% of the respondents, or 977,000 households, planning to purchase paint and apply it themselves.

Roofing will also be a significant project to tackle during this period, with 2% of the respondents expressing the plans to install the building materials themselves over the next year. Only 0.6% said they would be calling on a contractor for partial assistance, which indicates a growing trend among consumers to try the reroofing job on their own.

Ranking third in this breakout was adding a deck, which 1.8%, or 799,000 households, will be doing themselves over the next year. Only 1% of the total respondents plan to do the construction with contractor assistance. Adding a deck ranked fifth among the top 10 DIY projects done in 1981.

Roofing

(Continued from page 44)

demand among owners of pre-1940 homes, where 1.7% of those owners bought stone. Slab, which was stronger overall than stone, also peaked in popularity with homes built before 1940; 2.9% of those homeowners purchased slab in the last year.

Wood decks proved to be less popular overall that poured concrete patios. Homeowners whose residences were built in the 1940's and since 1970 had most often made deck purchases; 6.5% in the first case, 6% in the latter.

However, of those living in houses built since 1970, as many, plan to purchase wood deck material as hvae already bought. This could indicate an increased interest in decks compared with poured concrete patios. While 11.4% of respondents living in post-1970 housing have bought concrete materials, only 1.8% planned to do so.

Home center selection

(Continued from page 17)

be their main reason, which could explain why home centers may not be capturing a larger market share. Of those polled who said they shopped mainly in a specialty store, 66% said it was for selection, while service ranked second, with a 38% response.

Speculatively, with so many homeowners (particularly younger professionals) expressing the need for service, and with the perception that home centers are not providing it, industry retailers could do well to re-evaluate their in-store assistance and employee-training programs if they want a larger share of the 44.4 million single-family households.

HOMEOWNER PROFILE

10 most important projects completed—Exterior

Project	Number of households (in thousands) DIY	Contractor*
1. Paint house	1,598	399
2. Storm doors/windows	844	577
3. New roof	710	799
4. Landscape/sprinklers	710	266
5. Add deck	666	89
6. Add patio	622	355
7. Cover patio	399	178
8. Add fencing	355	222
9. Add garage	266	355
10. Siding	266	311

10 most important projects planned—Exterior

Project	Households that plan to do (in thousands) Themselves	Contractor*
1. Paint House	977	399
2. New Roof	888	266
3. Add Deck	792	444
4. Add Fencing	488	888
5. Storm Doors/Windows	399	266
6. Cover Patio	355	888
7. Landscape/Sprinklers	355	888
8. Add a Shed	266	—
9. Gutters/Downspouts	222	888
10. Add Garage	222	444

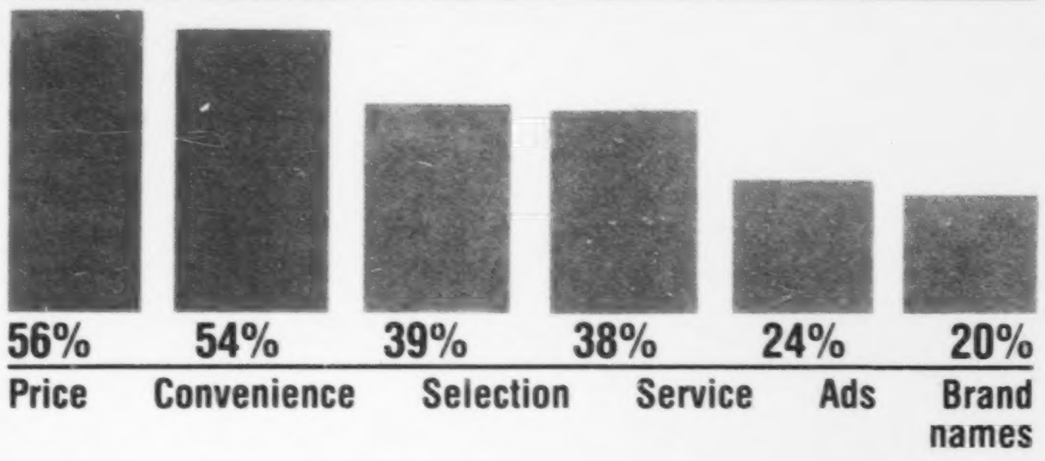
*all or part of work

Reprints available

For reprints of this special section on DIY activity, contact Kathy Cronin, Lebhar-Friedman, 425 Park Ave., New York, N.Y. 10022. A complete 150-page survey report is also available for $300. Additional demographic and product breakouts are available for $50 each by: combined household income; nine census regions; age of head of household; number of previous homes owned and current home value. Contact Wyatt Kash at the above address.

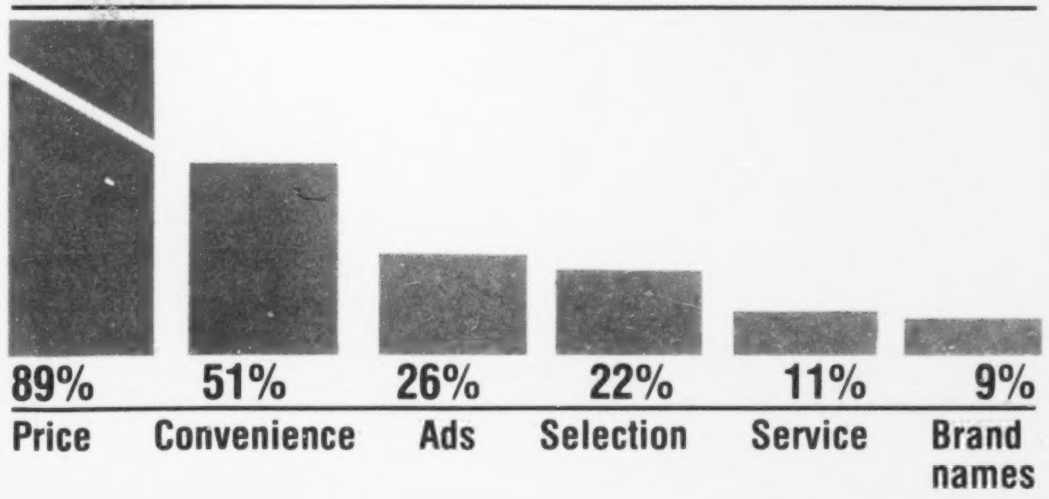
HOMEOWNER PROFILE

Why do they shop at general merchandise stores?



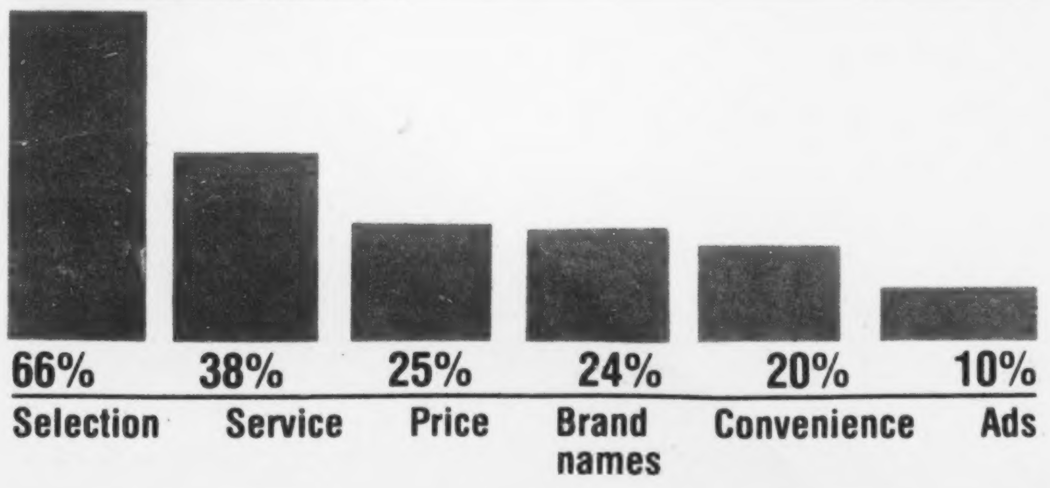
HOMEOWNER PROFILE

Why do they shop at discount stores?



HOMEOWNER PROFILE

Why do they shop at specialty retailers?



NHCN/NAHB keys buying trends

Seed and fertilizer, paint and fasteners were the products homeowners most often purchased during the past 12 months, according to the *NHCN*-NAHB survey.

This study investigated the home improvement trends and buying habits among owners of the nation's 44.4 million single-family, detached, owner-occupied dwellings.

Percentages in the product preference charts may be applied to 44.4 million to obtain a picture of the actual market size.

Consistently throughout this study fewer respondents plan to buy products than have already made purchases. At least two reasons have been offered to explain this phenomena.

First, the economy may have fostered buying caution among consumers. Second, respondents, when asked about purchases made in the past 12 months, may have included some made earlier.

HOMEOWNER PROFILE

Most popular DIY products among surveyed households*

Rank	Product	% of respondents*
1.	Seed and fertilizer	44.2
2.	Paint	39.3
3.	Fasteners	33.3
4.	Brushes/rollers/pads	27.1
5.	Carpet	27.0
6.	Hand tools	26.0
7.	Fire/smoke detectors	24.5
8.	Lawn mowers	22.6
9.	Power Tools	22.5
10.	Adhesives/caulks/ sealants	22.5
11.	Garden hose	22.3
12.	Faucets	21.9
13.	Toilet seat	21.4
14.	Wallpaper	21.1
15.	Drapes	20.9
16.	Weather stripping	19.1
17.	Lawn & garden tools/ equipment	19.1
18.	Attic insulation	19.4
19.	Door locks	19.3
20.	Wiring, wall outlets	18.7
21.	Curtains	17.7
22.	Finished furniture	17.7
23.	Switch plates	16.8
24.	Roofing	15.1
25.	Trimmer/edgers	14.5

*bought over the last 12 months
Source: NHCN NAHB research

HOMEOWNER PROFILE

Most popular DIY products for future purchase*

Rank	Product	% of respondents*
1.	Seed and fertilizer	19.9
2.	Paint	15.5
3.	Fasteners	11.2
4.	Carpet	9.0
5.	Brushes/rollers/pads	8.5
6.	Drapes	8.3
7.	Gutters/downspouts	7.9
8.	Wall paper	7.9
9.	Attic insulation	7.9
10.	Garden hose	7.1
11.	Adhesive/caulks/ sealants	6.6
12.	Hand tools	6.6
13.	Lawn and garden tools/equipment	6.1
14.	Faucets	6.0
15.	Toilet seats	5.6
16.	Curtains	5.6
17.	Door locks	5.5
18.	Lawn mowers	5.5
19.	Roofing	5.4
20.	Weather stripping	5.3
21.	Ceiling fans	5.3
22.	Water heater wrap	5.1
23.	Fire/smoke detector	5.0
24.	Driveway sealer	4.9
25.	Finished furniture	4.9

*planning to buy over the next 12 months
Source: NHCN NAHB research

FINANCIAL NEWS

SALES & EARNINGS

Company	Period Ended	Current Sales*	Year-Ago Sales*	% Change	Current Earnings*	Year-Ago Earnings*	% Change
Hechinger	5/1-1st qtr.	$ 54,756	$ 51,885	6	$2,020	$1,787	13
The Home Depot	5/2-1st qtr.	25,610	8,011	220	795	526	51
Lowe's	5/29-4 wks.	86,500	80,100	8	—	—	—
Pay 'n Save	5/1-1st qtr.	218,105	208,697	5	912	1,251	−27
Scotty's	5/22-4 wks.	27,252	27,488	− 1	—	—	—

*$ in thousands

STOCK PRICES

	As of 6/9	52-week High	52-week Low	P/E Ratio
Boise Cascade (NYSE)	22⅜	48¼	22⅜	7
Diamond Int'l (NYSE)	39	41¼	26¼	17
Evans Products (NYSE) [Alamo Ent., Grossman's, Moore's, Hubbard & Johnson, Lindsley]	9⅛	26½	9	10
Forest City (AMEX)	12⅝	19¼	11¼	—
W. R. Grace (NYSE) [Angels, Cashway, Channel, Handy City, Handy Dan, Orchard]	34½	51	34⅛	4
Lowe's (NYSE)	14⅜	18⅝	10½	15
Payless Cashways (NYSE) [Furrow]	19⅜	22¼	15¼	15
Scotty's (NYSE)	17½	26⅝	15⅛	9
Southwest Forest Industries (NYSE) [Dunlap's, Knox Lumber]	9¼	24¼	9	33

*$ in millions

Over-the-counter stocks

	As of 6/9 Bid	As of 6/9 Asked	52-week High (Bid)	52-week Low (Bid)
Erb Lumber	8¾	9½	14¾	7½
Hechinger	17⅞	18¼	23⅛	15¼
Hines Lumber	18	19	21	15
The Home Depot	18⅛	18⅜	18⅛	6⅛
Pay 'N Pak	12⅛	12⅜	18	12⅛
Pay 'n Save	17⅜	17⅝	29½	16½
Scotts Seaboard [Scott's]	1⅛	1⅝	2¾	½
Wolohan Lumber	3⅜	3⅝	5⅝	3

Home Depot 1st-qtr. net up 51%

ATLANTA—Although it incurred additional expenses from expanding its four stores here, The Home Depot saw net earnings increase 51% and sales rise 220% during the first quarter ended May 2, according to company officials.

The eight-store chain, helped in the period by the opening of four outlets in the Miami area since the first quarter 1981, had first-quarter sales this year of $25,610,202 which helped net income increase to $794,541.

The expansion and remodeling of the company's Atlanta stores (*NHCN*, Feb. 1) was completed in April and cost the chain about $71,000 in personnel expenses along with capitalized leasehold improvements and store fixture expenditures of $390,000, according to officials.

"The additional space and revamping of departments is expected to increase future sales, facilitate better traffic flow and provide additional operating efficiencies," chairman Bernard Marcus and president Arthur Blank told shareholders.

Despite the ongoing changes in the period, they said, the Atlanta stores showed significant although undisclosed sales gains.

In other Home Depot developments in the quarter, shareholders approved an increase in the number of authorized common shares from four million to 15 million.

Hechinger's 1st-qtr. net rises 13%

LANDOVER, Md.—Despite poor weather which adversely affected its sales, Hechinger posted a 13% increase in net income and a 5.5% gain on sales in the first quarter ended May 1, company officials announced.

The 32-store chain's earnings rose to $2,020,226 on sales of $54,755,561 in the quarter.

Officials pointed out that the company's results were helped by an expense control program, aimed at improving earnings, and by the opening of a new store on the west side of Baltimore, which has produced better-than-expected volume.

Palmer G. Lewis posts 1st loss

SEATTLE—Building materials distributor Palmer G. Lewis, Auburn, Wash., incurred its first quarterly net loss in the last 30 years with a $126,267 loss in its first quarter ended April 25, company officials said at its annual meeting here last month.

A part of the loss resulted from a 17% decline in sales in the period compared to a year ago to $21,794,710.

Chairman Robert D. Peterson told shareholders that high interest rates continue to plague the company and were the primary cause for the disappointing results.

He said the first quarter is historically the Northwestern wholesaler's weakest period of the year and that officials expected business to improve, with month-to-month earnings comparisons for the remainder of the year looking more favorable.

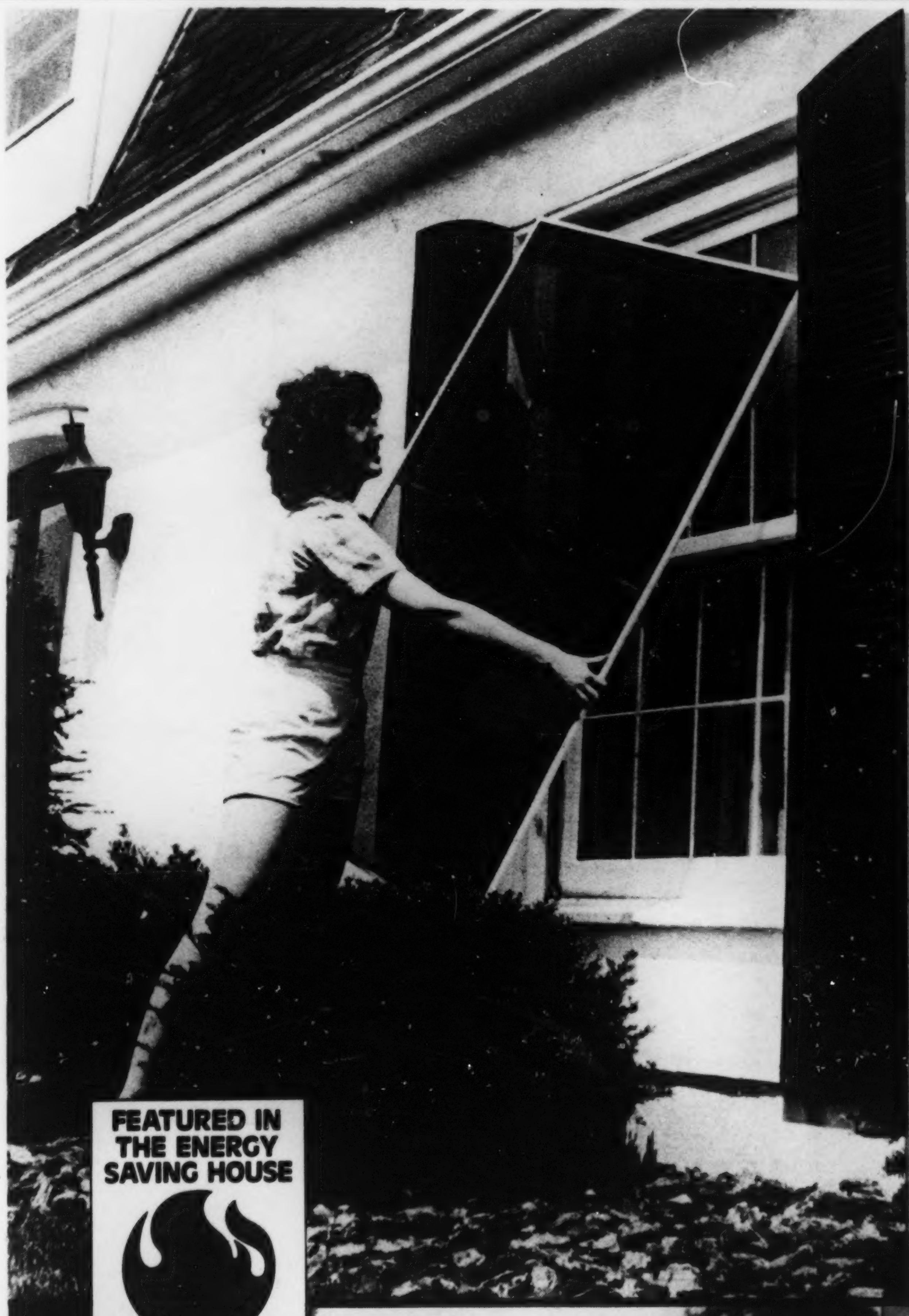
Lowe's May biz sets new record

NORTH WILKESBORO, N.C.—Lowe's posted its highest four-week retail sales total ever during the period ended May 29 as the 231-store chain's retail volume was up 27% compared to May 1981 to $50.2 million, officials reported.

Overall, Lowe's sales were up 8% in the month to $86.5 million, the most positive sales comparis on for the company in 11 months.

PEOPLE

every issue
in
National Home Center News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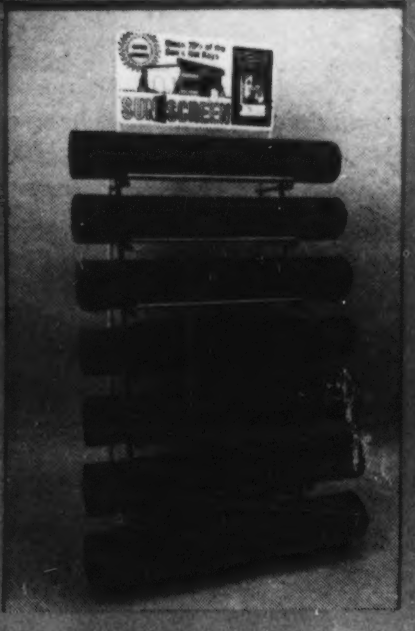

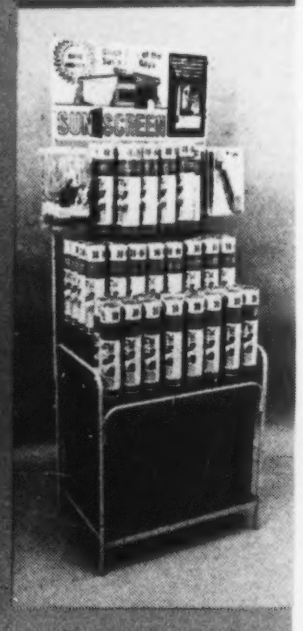

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Home Center News®

Vol. 8, No. 15 The newspaper for retailers serving homeowners and contractors. Published by Lebhar-Friedman Inc. July 19, 1982
$7 per year $2 per copy

Handy City is liquidating the largest Green/Harris store in Morrow, Ga., near Atlanta, with a warehouse sale that includes items like studs for 49¢ and Glidden Spread Satin at $7.88. When the sale ends next month, the unit will become Handy City's new distribution center.
NHCN photo

Canada's faltering economy spurs cutbacks at chains

By John Caulfield
NHCN associate editor

TORONTO—Canadian home center operators are closing stores, cleavering personnel ranks and slashing inventory in the face of what can only be described as the near-depression state of this country's economy.

Industry executives look at the dismal numbers—10.2% unemployment, 11.8% inflation, a 64% drop in single family housing starts from a year ago, and a Canadian dollar that is worth only 77 American cents—and lament they can see no improvement in the economy, or their own businesses, until late 1983.

"Consumer confidence is absolutely zip, and we're finding our industry is not as recession-proof as we thought," said Alan Keyworth, president of the 212-unit, $416 million Beaver Lumber chain here.

Canada's largest chain had a 10% increase in fiscal 1982 sales ($90 million coming from its 74 franchised stores), but had flat earnings of $6.6 million. Beaver, a subsidiary of Molson, the brewing concern, has now imposed a manpower freeze ("We've cut 74 'beyond store' people and virtually have no part-time help," Keyworth said) and extended management salary reviews to 17 months. Most significant was its closing of 28 units and its plans to lop off 30 more in fiscal 1983, ending March of next year. "We should have done this two years ago," he said.

In an effort to reduce its overhead, Beaver has also cut its "capital employed" expenses (inventory plus receivables) by $27 million. The chain currently stocks $71 million worth of products.

Keyworth envisioned a drastically slimmed-down chain of 160-175 stores with sales of $300 million. "Right now, our big ticket products aren't selling, which has really hurt, but we're ready to go when the economy improves, hopefully sometime next year."

That optimism is shared by neither the majority of Canada's 24 million population, nor most Canadian or United States economists, who blame the Liberal Government's two-year "Canadianization" program—intended to reduce foreign ownership of the country's gas and oil industries to 50% by 1990—as the undertow dragging down the economy.

The program, which increased Canada's share in these industries by only 6.7% since it was started, to 34.7%, has resulted in the withdrawal of over $8 billion of foreign investment

(Continued on page 38)

W. R. Grace divests Green/Harris yards

By Kenneth Schept
NHCN senior editor

MORROW, Ga.—W. R. Grace is divesting eight-store Green/Harris, the Southeast lumberyard operation that did not fit the conglomerate's retailing formula.

Five of the stores are currently being liquidated. Three are being sold to the current managers.

Grace has been trying to sell the chain as an entity for at least the past 18 months.

"We have not come up with a deal that is palatable at this point, but we will," Frank Denny, president of Grace's home center division, told *NHCN* last December.

Such a deal never materialized and early in May a decision was made to offer units to managers and liquidate stores that were not purchased.

Grace had attempted to bring the Green/Harris stores more in line with the parent company's DIY orientation. Advertising was increased and some units were renamed G&H Home Centers.

(Continued on page 35)

Exclusive NHCN survey

Western Show may shift attendance

NATIONAL REPORT—The emergence of the Western Home Center Show onto the 1983 trade show calendar is likely to cause a marked drain on attendance at the National Home Center Show, according to a nationwide survey of home center executives.

Four out of every nine executives polled said the Western regional show "fills a void" in the home center industry. But when asked if their companies would send the same number of people next year to the National Home Center Show compared to this year, 40.8% of the executives said they would send "fewer people."

Approximately 45% said they would send the same number, and 14.3% said they would send more.

These and other findings surfaced from a *National Home Center News* survey mailed to the top executives of 1,700 home center operations across the country and another 1,700 manufacturers serving the industry. A total of 12.2% of the home center chains responded to survey, conducted during May and June. The response

(Continued on page 38)

Rear-baggers head mower sales

By Greg Puchalski
NHCN senior editor

NATIONAL REPORT—Rear-bagging lawn mowers have spearheaded a solid mower sales season, in the face of impending safety regulations from the Consumer Product Safety Commission.

The C.P.S.C. rules, requiring mower manufacturers to install safety features encompassing a handle device to stop the blade and new housing design requirements, are not driving consumers to purchase this year's units, however. Next year's models are expected to be more expensive due to the new standards.

Dealers cited an abundance of rainfall which has kept grass growing and consumers buying in some parts of the country, alterations in programs to meet consumers' needs, and even a willingness to upgrade to better models.

"Maybe the consumer has been led on by what will happen next year," said buyer Richard Fox of 18-unit Scott's, Linthicum, Md. "Mowers will be no cheaper. But, there has been lots of rain and people who have put off mower purchases in the past are replacing their worn-out models."

Rear-baggers have emerged as the most popular mowers for many dealers.

"Rear-baggers offer an ease

(Continued on page 35)

NEWSBREAKS

McNULTY LEAVES GRACE. Robert McNulty, who joined W. R. Grace two years ago from a two-store chain, and became executive vp-merchandising for Angels, has resigned from his current post as executive vp-merchandising of Grace's Western home center region. No successor has been named.

HANZI RETURNS. Former Handy City president Georges Hanzi has returned to the home center industry as president of 49-unit Homecrafters, Pelham, Ala. Hanzi has brought over former Handy City executives Steve Wylie and Huey Stafford as vice presidents of administration and merchandise, respectively. A spokesman at Homecrafters' parent, Union Camp, said efforts to sell the chain (*NHCN*, Nov. 9, 1981) are in "limbo."

INSIDE

SEASONALLY ADJUSTED figures show a 6% decline in spending for repair/remodeling in the first quarter . . . . **page 2**
NEW HAMPSHIRE residents now need a fire department permit before they can buy a kerosene heater 2
PAYLESS CASHWAYS bought two Brookhart units . . . 3
FLOODS IN Connecticut caused a run on pumps. 3
EXTENDED MILL closings will force lumber prices upward . 6

HOME SECURITY CENTER
5
SMOKE DE
Garage Door Opener

NATIONAL REPORT—With F.B.I. statistics showing one burglary occurring every eight seconds and one larceny-theft every four seconds nationwide, home center chains around the country are witnessing unprecedented sales growth in security hardware.

Retailers merchandising these security products, however, assert that profitability depends primarily on stocking them in departments where consumers expect to find them.

(See story, page 15.)